



Virto Incoming E-mail Feature for SharePoint Release 3.0.0

User and Installation Guide

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Virto Incoming E-mail Feature for SharePoint

Overview

SharePoint enables process incoming e-mail messages and rout them to a list of predefined type. This feature is organized with Incoming Email Service and can be found in "Operations" tab in SharePoint "Central Administration" block.

If Incoming e-mail service is working, SharePoint runs background job - Windows SharePoint Services Incoming E-Mail - according to timer settings. This job is controlled by Windows SharePoint Services Timer like other planned jobs. At the same time e-mail messages are collected from only one SMTP-domain.

After e-mail routing is adjusted on the farm level, site administrators can allow sending e-mail to certain lists in the library. Not all the types of lists are supported for this procedure. The list of available ones is in "Incoming email settings" block in "Communications" section. Available settings depend on type of the list – for example, document library asks what you are going to do with an attachment, and blog list enables to define if contained element should be instantly published. When email is processed, four parameters are saved by default - EmailTo, EmailCc, EmailFrom, EmailSubject.

With the help of this functionality you can process incoming e-mail messages and keep them in a single list. Usually this service is used for collecting e-mail messages from e-mail boxes for groups, such as Support, Sales, Info etc.

After such e-mail message was processed by the service and placed to a certain list, you can adjust sending alerts to groups notifying about new incoming e-mail message or start processing of this e-mail with custom workflow (for instance for working with help desk service).

SharePoint Incoming E-mail has several disadvantages, such as collecting e-mails only from SMTP-server, attachments and original format of e-mail are not displayed in a list; and it is impossible to collect e-mail messages to a custom list, only lists of certain types can be used.

Virto SharePoint Incoming E-mail Feature is also supposed for processing incoming e-mails and recording them to lists. But it works with POP3 and IMAP servers and supports extended features such as:

1. Working with POP3 and IMAP e-mails
2. Collecting emails from different e-mail servers to a single list.
3. Saving incoming e-mail to any list or local disc
4. Special list template (for more comfortable work)
5. Ability to add e-mails to a list of any type including custom list (not only predefined lists can be used)
6. Fields EmailTo, EmailCc, EmailFrom, EmailSubject, **EmailHtmlBody** are added to the list automatically. Original email format and all attachments are saved in the list attachment.
7. Email Document Object Model (EDOM) for developers is supported.
8. Extracting e-mail attachments from Outlook "winmail.dat" file.

System Requirements

Operating System

Microsoft Windows Server 2003, 2008, 2012

Server

SharePoint Release 2013:

- Microsoft Windows SharePoint Foundation 2013 or Microsoft Office SharePoint Server 2013;
- Microsoft .NET Framework 4.5;

SharePoint Release 2010:

- Microsoft Windows SharePoint Foundation 2010 or Microsoft Office SharePoint Server 2010;
- Microsoft .NET Framework 3.5;

SharePoint Release 3:

- Microsoft Windows SharePoint Services v3 or Microsoft Office SharePoint Server 2007;
- Microsoft .NET Framework 3.5;

Note: *This product is not compatible with SPS 2003 and WSS v2.*

Browser

Microsoft Internet Explorer 7 or higher.

Installation

This section describes how to install, upgrade, uninstall, or contact Support for the Virto Incoming E-mail Feature for SharePoint.

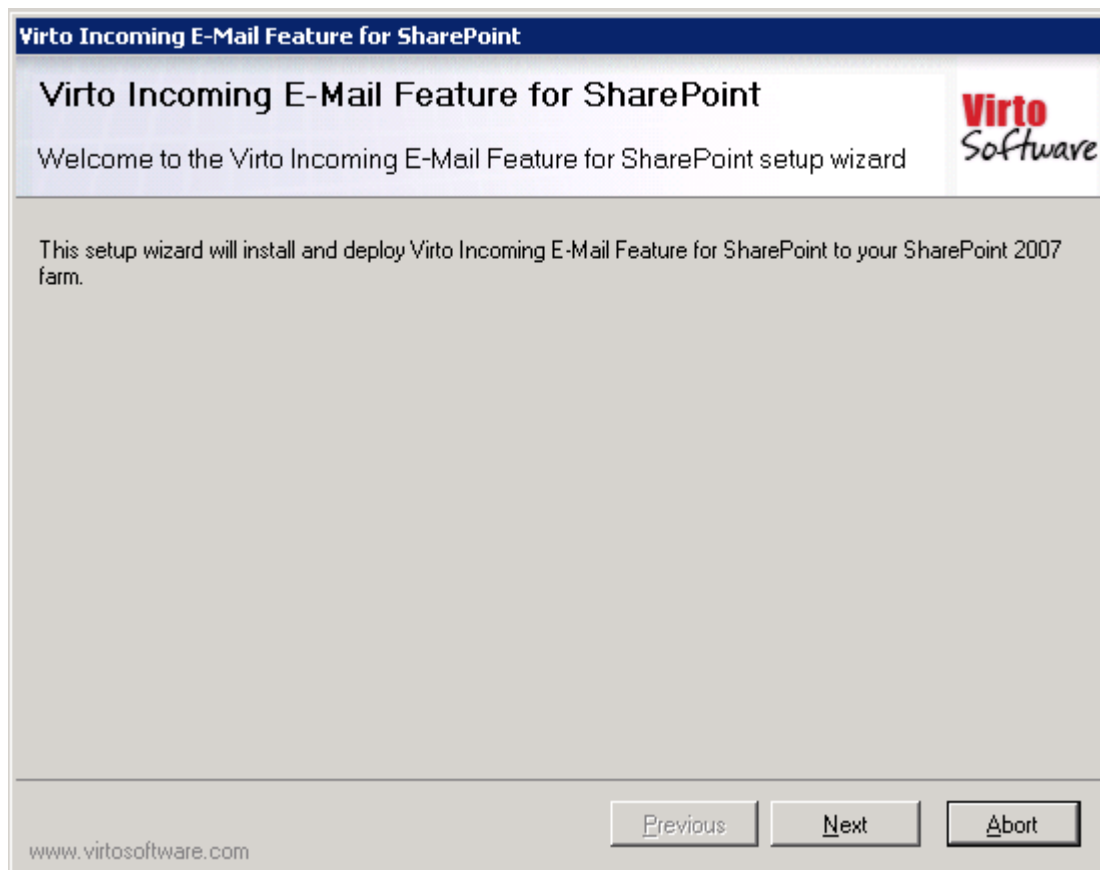
Installing Virto Incoming E-mail Feature for SharePoint

Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

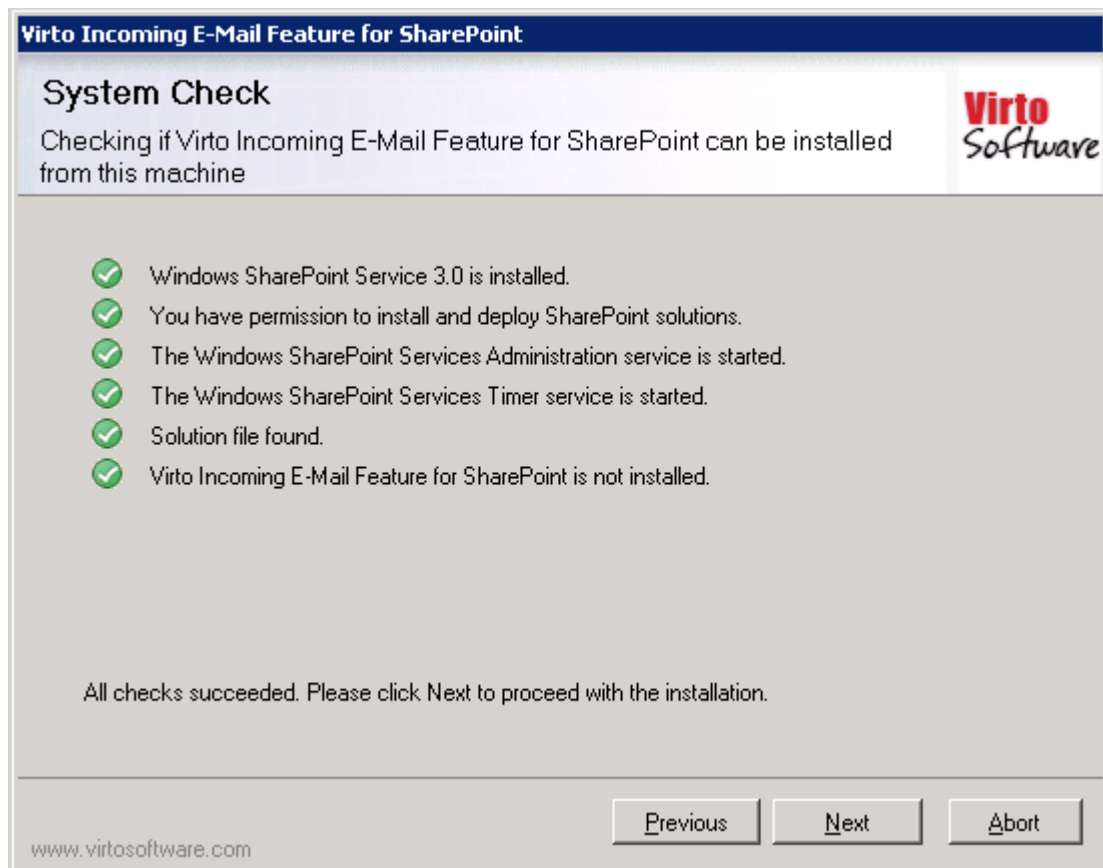
Virto Incoming E-mail Feature setup program provides links to the various installation components for the calendar.

To access Virto Incoming E-mail Feature Setup program download **Virto.Incoming.EMail.X.X.zip** file and unzip it. Run extracted Setup.exe file.

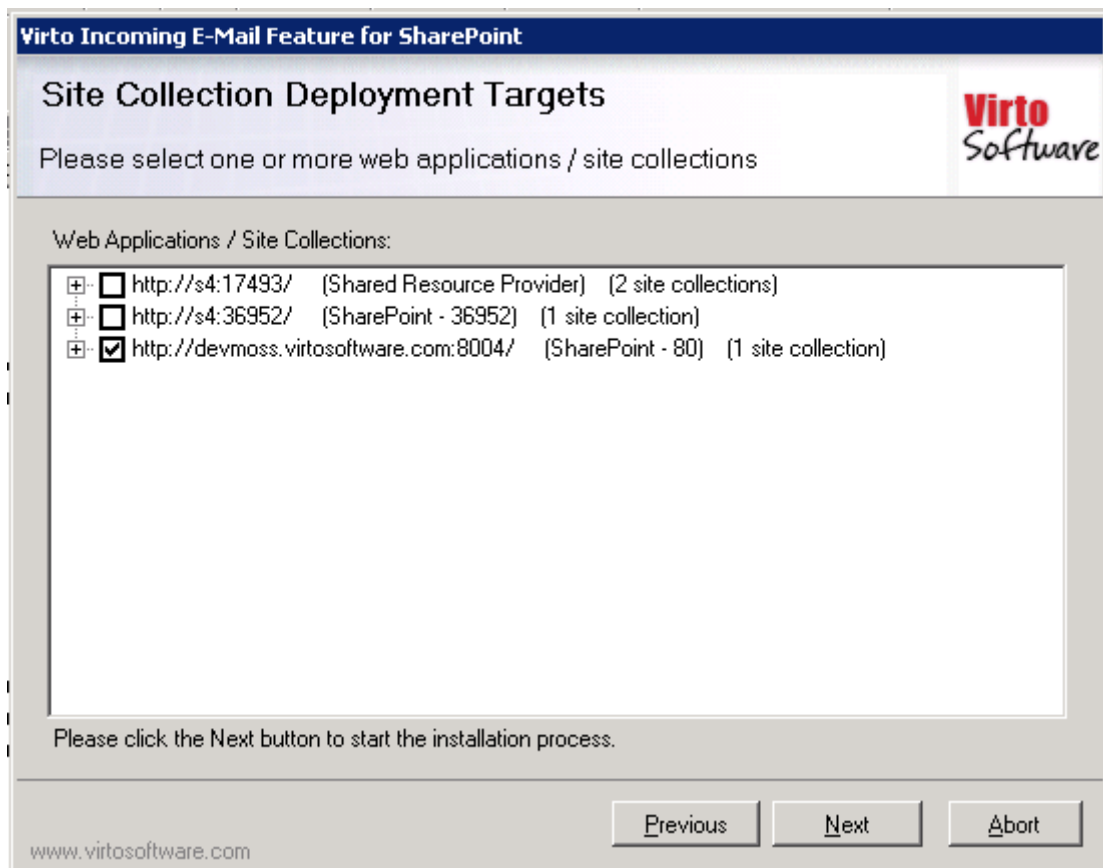
The setup wizard window will appear.



Virto Incoming E-mail Feature wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".

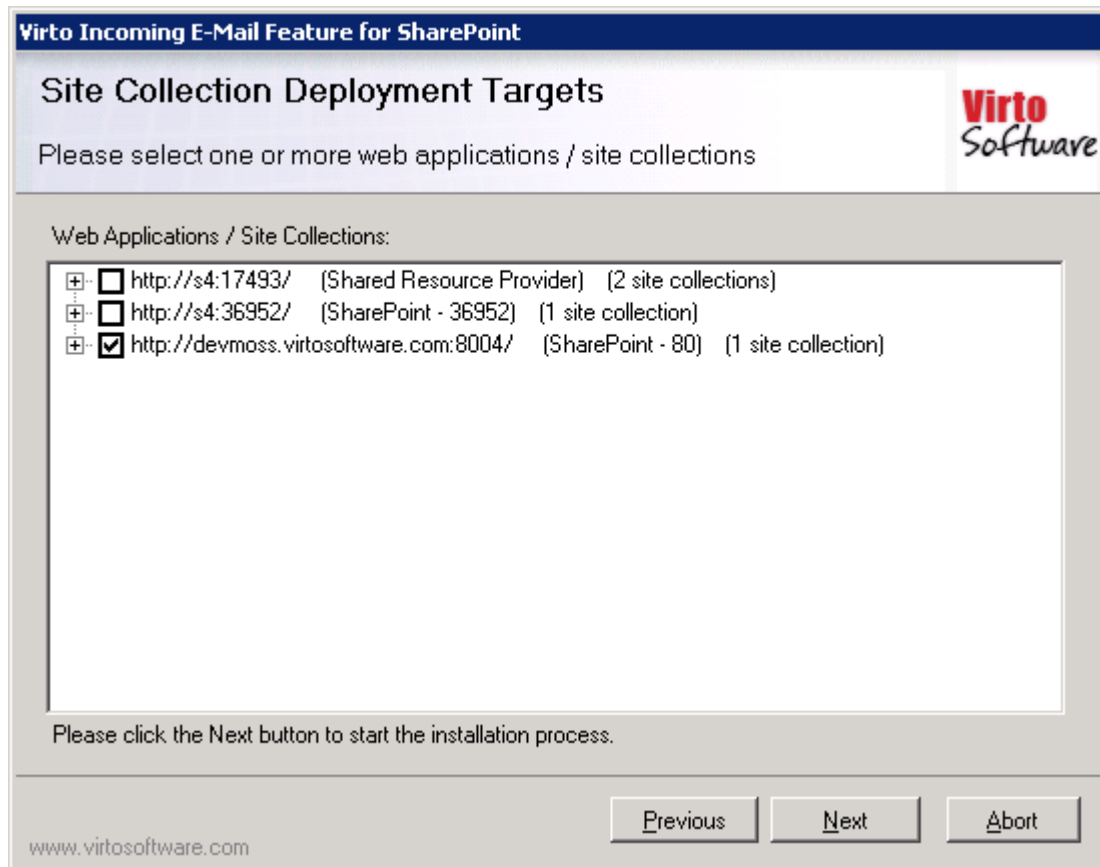


Check “I accept the terms in the License Agreement” and click “Next”.

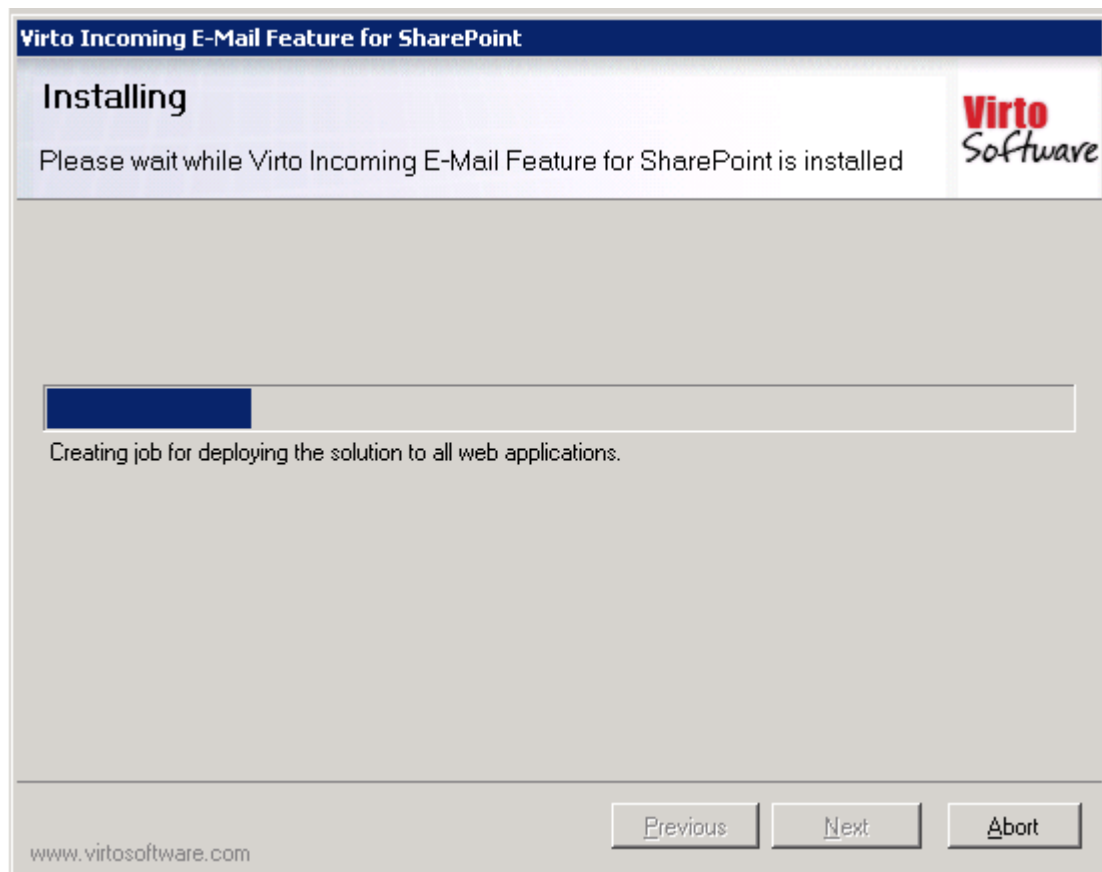


Select the web application(s) where you want to install the product.

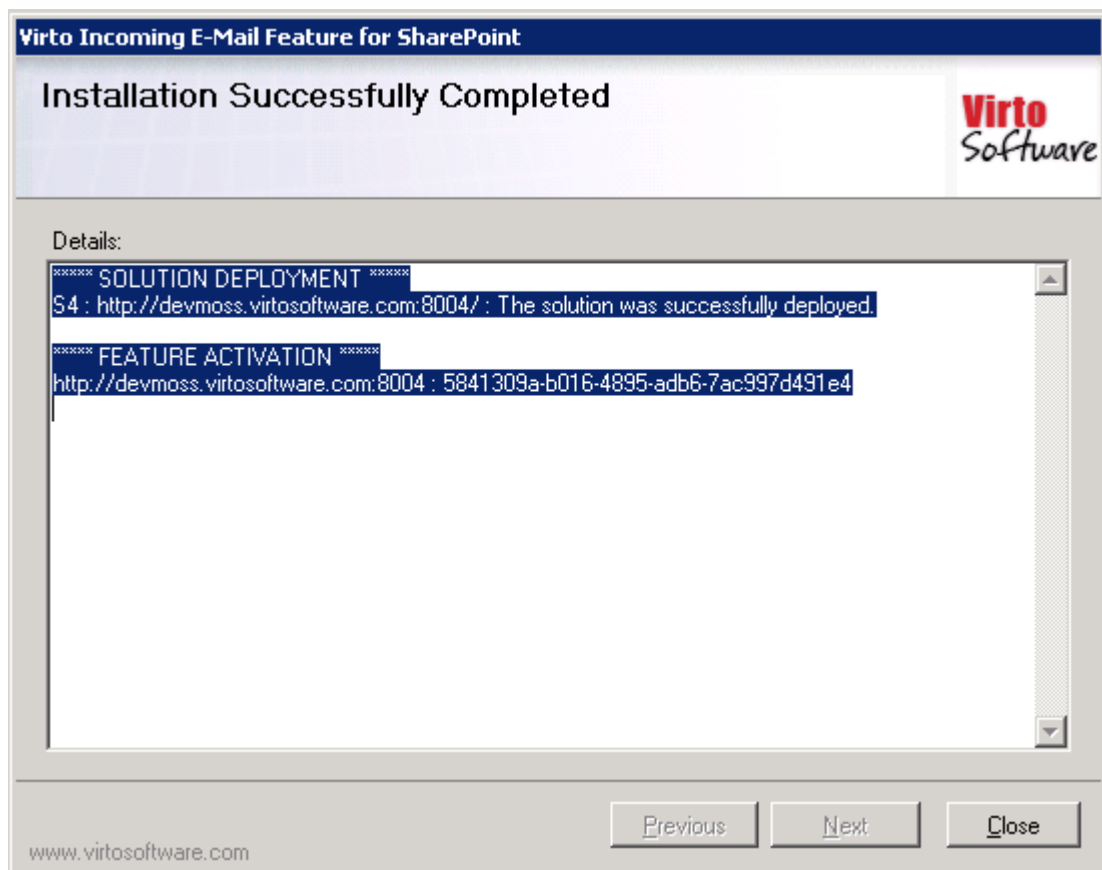
Warning: You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature.



Then click "Next".



Click “Close” to complete the installation.



License Activation

To see full instruction for successful activation of your component, please download “Virto License Manager” PDF instruction from [Downloads](#) section of our site or read it in [Wiki](#).

Upgrading Virto Incoming E-mail Feature for SharePoint

If you already use Virto Incoming E-mail Feature for SharePoint and need to upgrade it to the latest version, download the.zip file from <http://www.virtosoftware.com>. Unzip the file and run setup.exe as it is described in the *Installing Virto Incoming E-mail Feature for SharePoint* section.

Note: it is highly recommended to exit License Manager before upgrading. If you need to use License Manager, run it after upgrading.

On the step 3 check the box “Upgrade” and click “Next”.

Note: *if you had activated the license while installing the previous Virto Incoming E-mail Feature for SharePoint version, you do not need to activate it now.*

Uninstalling Virto Incoming E-mail Feature for SharePoint

To uninstall the Add-On:

1. Double click the Setup.exe extracted from downloaded **Virto.Incoming.EMail.X.X.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click “Next”.

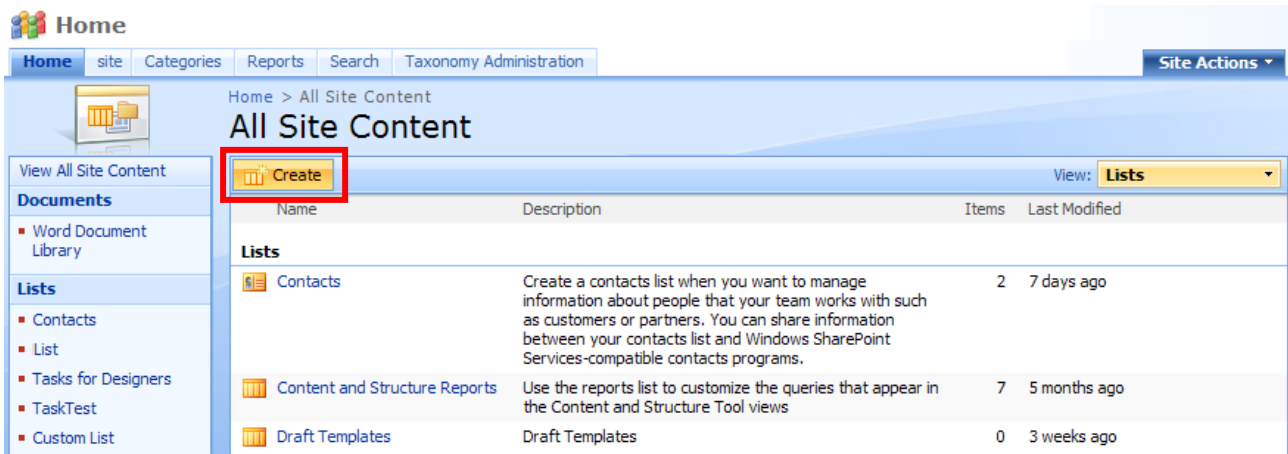
Installation -> List Template (Optional) -> POP3 box creation and adjustment -> how it looks in the List (or in another place where the routing is organized to).

Creating List for E-mail Collecting

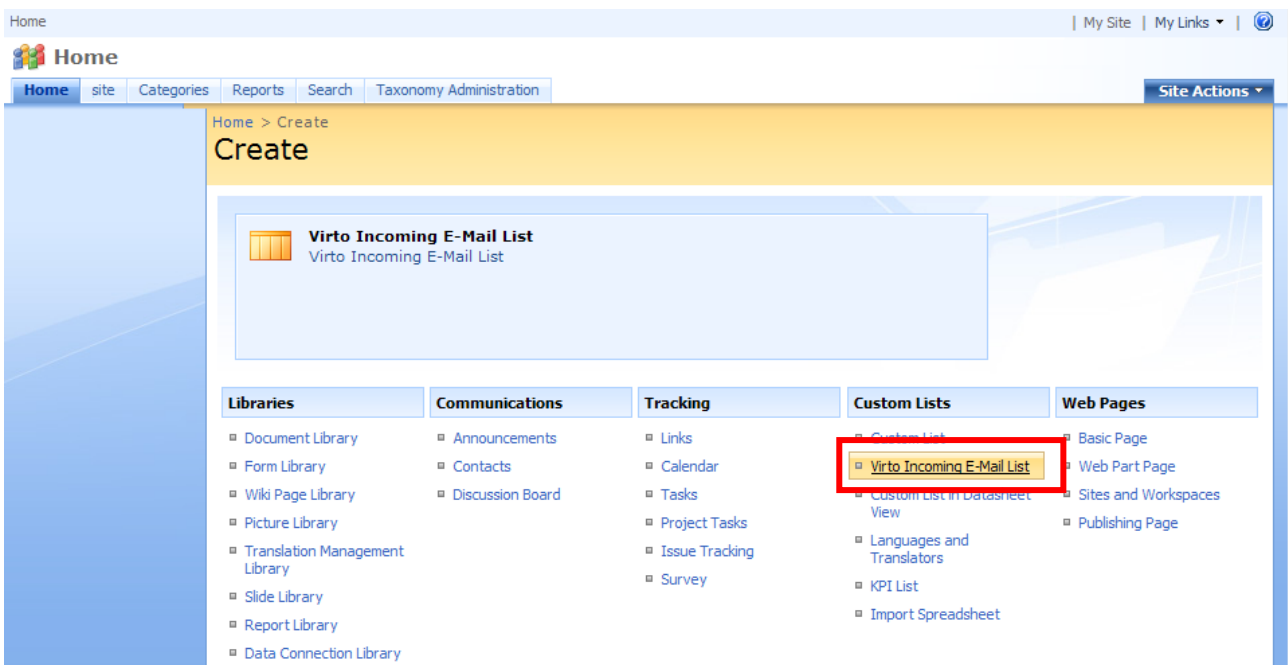
E-mail messages should be collected to a single place on a SharePoint site – a special **list**.

Note: *Virto Incoming E-mail Feature for SharePoint enables to use a list of **any type** (including custom lists) for collecting e-mails.*

So just create new list on the required SharePoint site.



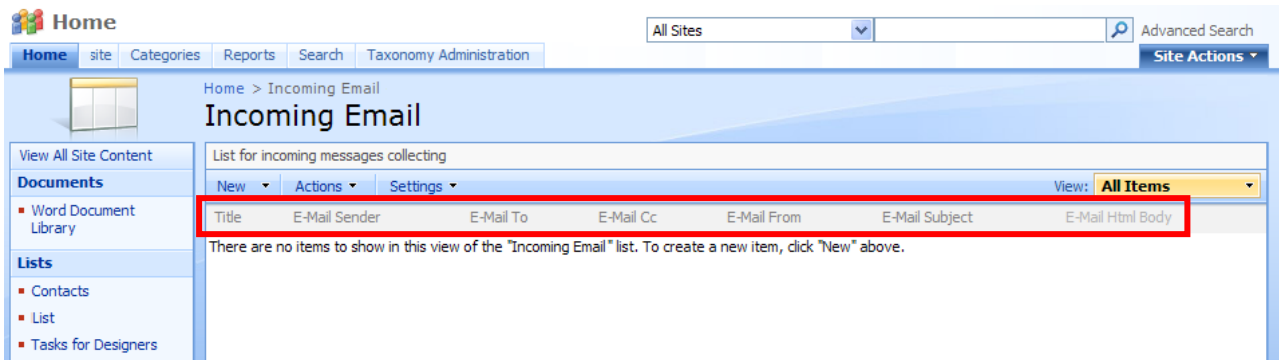
You can use special list template for e-mail messages collecting – **Virto Incoming Email List**. This template will appear in the list of available list templates after installation of Virto Incoming Email Feature.



Note: Virto Incoming Email List template is **not mandatory** to use.

Created List will be used for email message collecting when the POP3 box is adjusted. See the next section.

Five fields will be created in the list automatically: **EmailTo**, **EmailCc**, **EmailFrom**, **EmailSubject**, **EmailHtmlBody**.



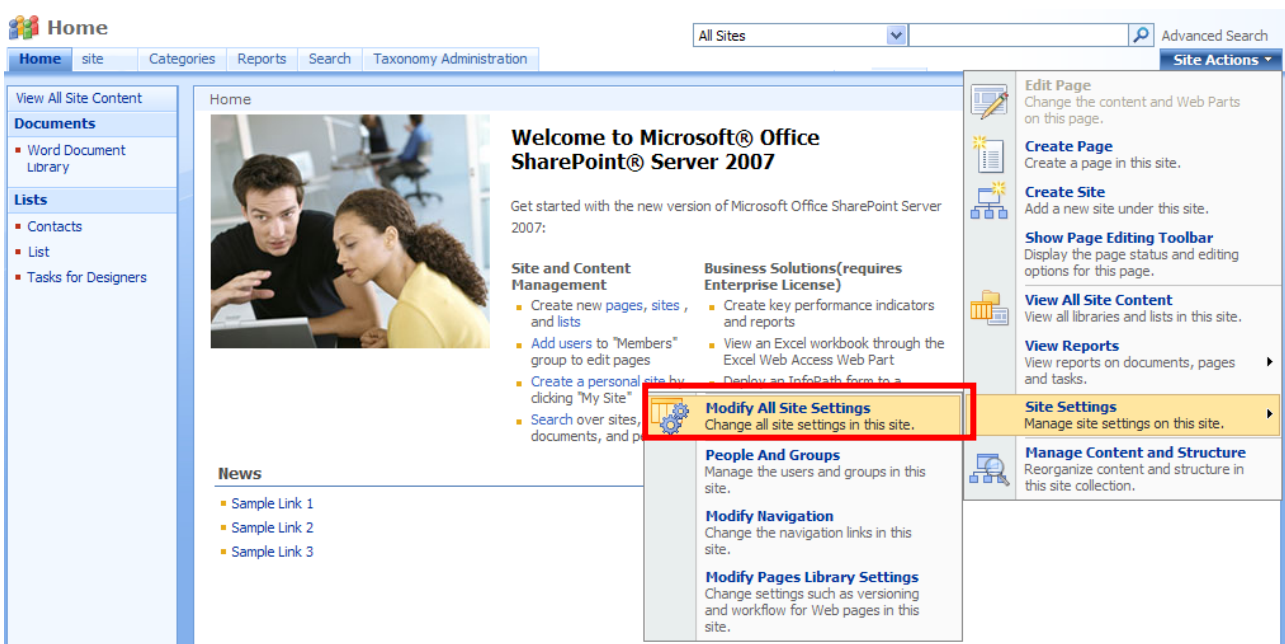
If you are going to use another type of a list, these fields will be automatically added to this list when it is selected for e-mail collecting.

Creating POP3 E-mail Box

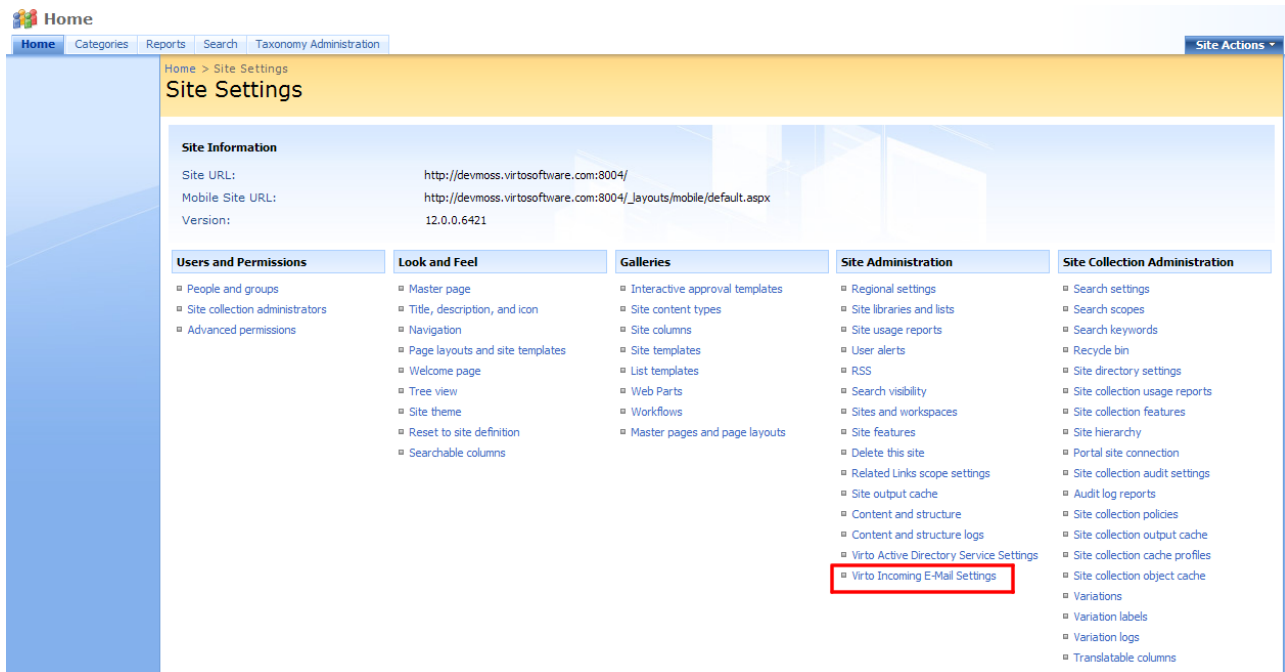
Before creating e-mail box, adjust domain from which e-mail messages will be taken.

Virto Incoming E-mail feature works does not support SMTP servers. Therefore, to collect messages from an e-mail server, you have to create at list one **E-mail box (POP3 Box)** or **IMAP Email box** (please see the next section to learn how to create IMAP E-mail box).

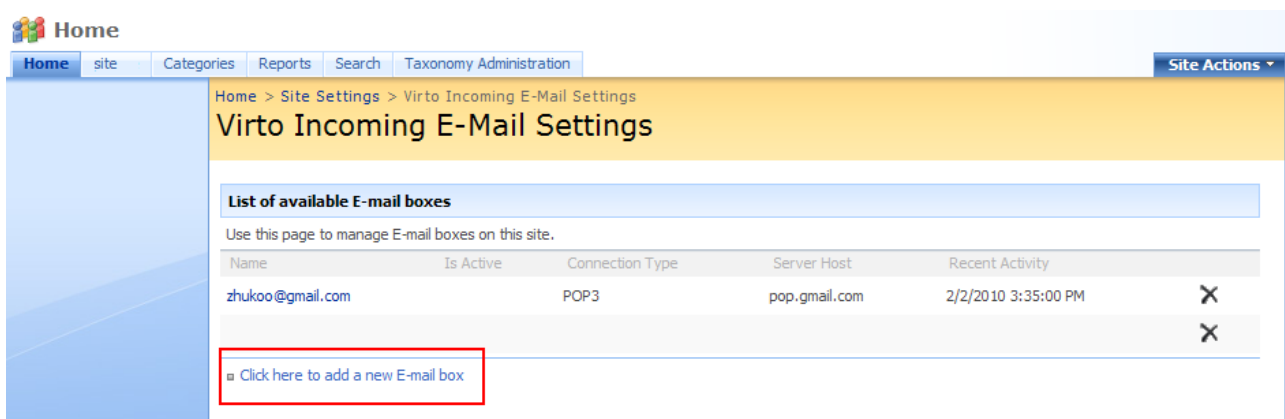
Go to “Site Actions – Site Settings – Modify All Site Settings”.



Now roll down and find “Virto Incoming Email Settings” in “Site Administration” block and click it.



Use “Click here to add a new E-mail Box”.



Now fill out the fields on the “Creating POP3 Box” page.

- 1) Enter **name** for POP3 mail box. Check the box “**Is Active**” to make this E-mail box working.
- 2) Select “**IMAP**” **connection type**.
- 3) Enter **server name**, **port**, define type of **secure connection**, enter **user name** and **password**.
- 4) Define the frequency of e-mail checking (every 30 minutes, for instance).
- 5) Click “**Check Settings**” to validate the data you’ve entered.
- 6) Select a place to store e-mail messages – a **list** (select required list in the dropdown) or **local disc** (type the path to a folder on your local disc).
- 7) Choose where **attachments** will be saved:
 - a. Do not save attachments
 - b. Save all attachments in root folder
 - c. Save all attachments in folder grouped by email subject
 - d. Save all attachments in folder grouped by email sender
 - e. Save all attachments in folder grouped by email file name
- 8) Click “**Save**” to save new e-mail box.

Home > Site Settings > Virto Incoming E-Mail Settings > Creating E-mail Box

Creating E-mail Box

Use this page to change the e-mail settings for this server. You can activate or deactivate incoming e-mail, specify connection settings and configure the e-mail processing rules.

General Information

Type a name for this E-mail box and select activity

Name:

Main Email Box

☒ Is Active

Connection Settings

Specify connection settings for E-mail server. Press 'Check Settings' button to check parameters.

Connection Type:

POP3

Server:

pop.gmail.com

Port:

25

Use Secure Connection:

SSL

User Name:

ozh@med.com

Password:

.....

Check e-mail every 5 minutes

Check Settings

Email Processing

Specify incoming E-Mail processing rule.

Note: After receiving the E-Mail will be removed from the mail server. E-Mail fields will be added to list automatically.

☒ Store E-Mail To List

List Name:

Incoming Email

☐ Save E-Mail To Local Disk

Local disk path:

For example: c:\inetpub\

Group attachments in folders?

☐ Do not save attachments

☒ Save all attachments in root folder

☐ Save all attachments in folder grouped by email subject

☐ Save all attachments in folder grouped by email sender

☐ Save all attachments in folder grouped by email file name

Save

Cancel

Email Attachments

Specify whether to group attachments in folders.

Note: This function is available for Document library only.

Note: you can create any amount of POP3 Boxes. But pay attention to the fact that only **one** list (or folder) can be selected for each of POP3 Boxes.

Note: Five fields will be created in the list automatically: **EmailTo**, **EmailCc**, **EmailFrom**, **EmailSubject**, **EmailHtmlBody**.

New POP3 Box will appear in the list of available e-mail boxes.

Home > Site Settings > Virto Incoming E-Mail Settings

Virto Incoming E-Mail Settings

List of available POP3 boxes

Use this page to manage POP3 boxes on this site.

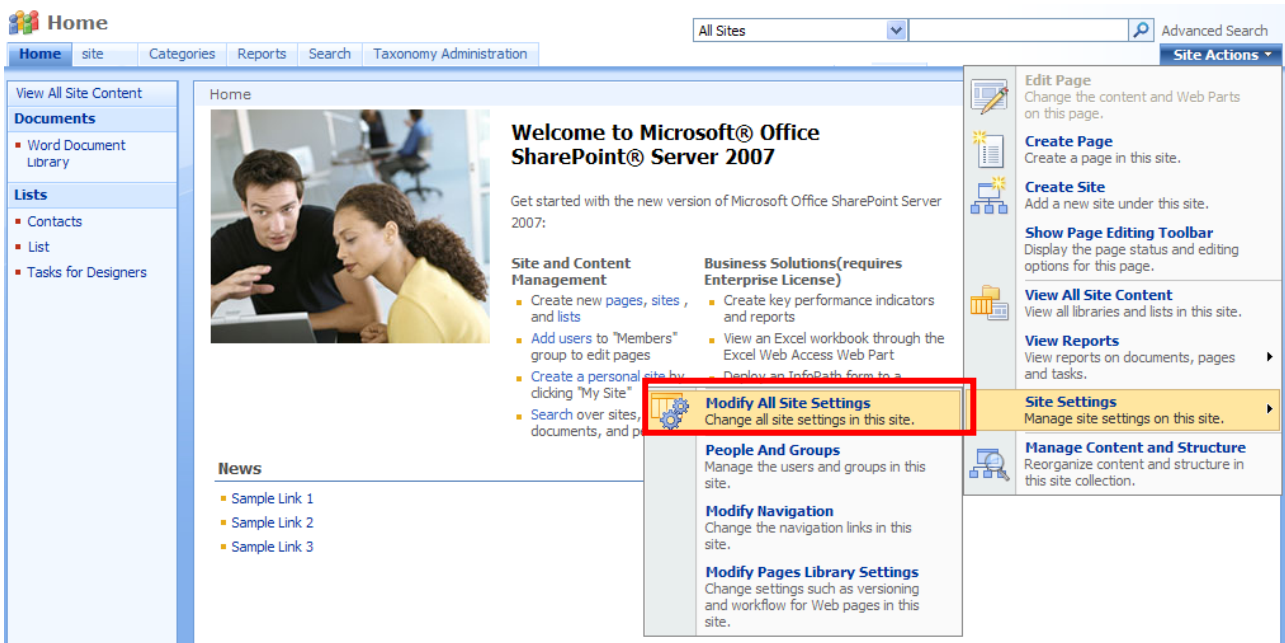
Name	Is Active	Pop3 Server Host	Recent Activity
Main Email Box	<input checked="" type="checkbox"/>	pop.gmail.com	X

[Click here to add a new POP3 box](#)

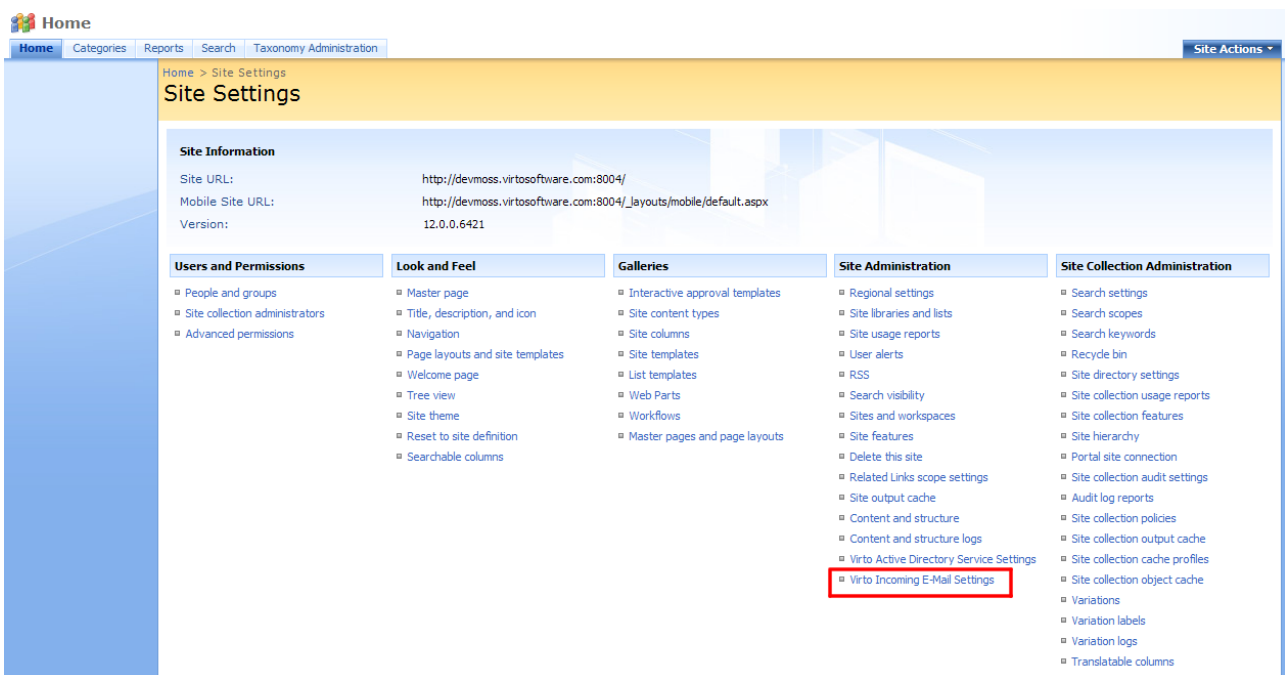
If this e-mail box is active, e-mail messages sent to pointed e-mail address will be automatically processed and sent to defined list or folder. See the next section.

Creating IMAP E-mail Box

To create IMAP E-mail box, go to “Site Actions – Site Settings – Modify All Site Settings”.



Now roll down and find “Virtos Incoming Email Settings” in “Site Administration” block and click it.



Use “Click here to add a new E-mail Box”.

Home > Site Settings > Virtio Incoming E-Mail Settings

Virtio Incoming E-Mail Settings

List of available E-mail boxes

Use this page to manage E-mail boxes on this site.

Name	Is Active	Connection Type	Server Host	Recent Activity	
zhukoo@gmail.com		POP3	pop.gmail.com	2/2/2010 3:35:00 PM	X

[Click here to add a new E-mail box](#)

Now fill out the fields on the “Creating E-mail Box” page.

- 1) Enter **name** for IMAP mail box. Check the box “**Is Active**” to make this E-mail box working.
- 2) Select “**IMAP**” **connection type**.
- 3) Enter **server name**, **port**, define type of **secure connection**, enter **user name** and **password**.
- 4) Define the frequency of e-mail checking (every 30 minutes, for instance).
- 5) Click “**Check Settings**” to validate the data you’ve entered.
- 6) Check the box “**Active IMAP Subscriptions**” and select IMAP folders to collect e-mail messages from. Click “**Load IMAP folders**” if there are no required ones displayed.
- 7) Select a place to store e-mail messages – a **list** (select required list in the dropdown) or **local disc** (type the path to a folder on your local disc).
- 8) Choose where **attachments** will be saved:
 - a. Do not save attachments
 - b. Save all attachments in root folder
 - c. Save all attachments in folder grouped by email subject
 - d. Save all attachments in folder grouped by email sender
 - e. Save all attachments in folder grouped by email file name
- 9) Click “**Save**” to save new e-mail box.

Home > Site Settings > Virtio Incoming E-Mail Settings > Creating E-mail Box

Creating E-mail Box

Use this page to change the e-mail settings for this server. You can activate or deactivate incoming e-mail, specify connection settings and configure the e-mail processing rules.

General Information
Type a name for this E-mail box and select activity

Name: Imap Email Box

☒ Is Active

Connection Settings
Specify connection settings for E-mail server. Press 'Check Settings' button to check parameters.

Connection Type: IMAP

Server: imap.gmail.com

Port: 993

Use Secure Connection: SSL

User Name: ozh@med.com

Password:

Check e-mail every 5 minutes

IMAP Subscriptions Select the IMAP folder from which you want to receive new messages. Click 'Load IMAP folder' button to get all available IMAP folders. Enable the corresponding checkbox to add a folder to the subscribed list. Note: You should select at least the Inbox folder.	Active IMAP Subscriptions: <input type="button" value="Load IMAP folders"/>
Email Processing Specify incoming E-Mail processing rule. Note: After receiving the E-Mail will be removed from the mail server. E-Mail fields will be added to list automatically.	<input checked="" type="radio"/> Store E-Mail To List List Name: <input type="text" value="Incoming Email"/>
Email Attachments Specify whether to group attachments in folders. Note: This function is available for Document library only.	<input type="radio"/> Save E-Mail To Local Disk Local disk path: For example: c:\inetpub\ <input type="text"/>
	Group attachments in folders? <input type="radio"/> Do not save attachments <input checked="" type="radio"/> Save all attachments in root folder <input type="radio"/> Save all attachments in folder grouped by email subject <input type="radio"/> Save all attachments in folder grouped by email sender <input type="radio"/> Save all attachments in folder grouped by email file name
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Note: you can create any amount of IMAP Boxes. But pay attention to the fact that only **one** list (or folder) can be selected for each of Boxes.

Note: Five fields will be created in the list automatically: **EmailTo**, **EmailCc**, **EmailFrom**, **EmailSubject**, **EmailHtmlBody**.

New IMAP Box will appear in the list of available e-mail boxes.

Home > Site Settings > Virtio Incoming E-Mail Settings

Virtio Incoming E-Mail Settings

List of available E-mail boxes

Use this page to manage E-mail boxes on this site.

Name	Is Active	Connection Type	Server Host	Recent Activity
IMAP E-mail Box	✓	IMAP	pop.gmail.com	2/2/2010 3:35:00 PM

[Click here to add a new E-mail box](#)

If this e-mail box is active, e-mail messages sent to pointed e-mail address will be automatically processed and sent to defined list or folder. See the next section.

E-mail Processing

All the messages sent to mentioned email box, will be collected from the e-mail server, placed to E-mail E-mail box created on the SharePoint site and then placed to a corresponding list or folder.

Go to the list you selected for collecting e-mail message (**Incoming Email** list in this case). You will see e-mail messages divided into five fields.

Home > Incoming Email

Incoming Email

View: All Items

Title	E-Mail Sender	E-Mail To	E-Mail Cc	E-Mail From	E-Mail Subject	E-Mail Html Body
(no title)	Will Peters	username@gmail.com	partner@gmail.com	Articles	Will Peters	<p>Dear Ted here are the Articles published Tuesday, 11 August 2009 on QJ.NET blogs network :</p> <p>QJ.NET Blog :</p> <p>PSP homebrew - PSPHUGO v1.3.1</p> <p>Wii homebrew - Homebrew Browser v0.3.4</p> <p>Civilization Revolution now available in the App Store</p> <p>More on PS3 Slim Rumors: French retailer claims PS3 Slim is real, makes a blurry appearance in a game developer video?</p> <p>PSP homebrew - JPCSP v0.3 revision 1131</p>

You can see **original e-mail format (.eml)** in the E-mail HTML Body field.

Home > Incoming Email

Incoming Email

View: All Items

Title	E-Mail Sender	E-Mail To	E-Mail Cc	E-Mail From	E-Mail Subject	E-Mail Html Body
(no title)	Will Peters	username@gmail.com	partner@gmail.com	Articles	Will Peters	<p>Dear Ted here are the Articles published Tuesday, 11 August 2009 on QJ.NET blogs network :</p> <p>QJ.NET Blog :</p> <p>PSP homebrew - PSPHUGO v1.3.1</p> <p>Wii homebrew - Homebrew Browser v0.3.4</p> <p>Civilization Revolution now available in the App Store</p> <p>More on PS3 Slim Rumors: French retailer claims PS3 Slim is real, makes a blurry appearance in a game developer video?</p> <p>PSP homebrew - JPCSP v0.3 revision 1131</p>

To view e-mail **attachments**, click “View Item”.

Home > Incoming Email

Incoming Email

View: All Items

Title	E-Mail Sender	E-Mail To	E-Mail Cc	E-Mail From	E-Mail Subject	E-Mail Html Body
(no title)	Will Peters	username@gmail.com	partner@gmail.com	Articles	Will Peters	<p>Dear Ted here are the Articles published Tuesday, 11 August 2009 on QJ.NET blogs network :</p> <p>QJ.NET Blog :</p> <p>PSP homebrew - PSPHUGO v1.3.1</p> <p>Wii homebrew - Homebrew Browser v0.3.4</p> <p>Civilization Revolution now available in the App Store</p> <p>More on PS3 Slim Rumors: French retailer claims PS3 Slim is real, makes a blurry appearance in a game developer video?</p> <p>PSP homebrew - JPCSP v0.3 revision 1131</p>

Links on all the attachments will be displayed. Use them to view attachments.

Home > Incoming Email > (no title)

Incoming Email: (no title)

Close

New Item | Edit Item | Delete Item | Manage Permissions | Alert Me | Version History

Title	Attachments
	Original Email.eml

Version: 1.0
 Created from e-mail at 11/13/2009 3:13 PM by System Account
 Last modified at 11/13/2009 3:13 PM by System Account

Close

This way you can organize e-mail routing and collect e-mail messages from different email boxes to special lists and folders on your SharePoint site.

Version Release History

Release Date	Version	Description
09/06/2013	v. 3.0.0	Added new license manager
01/02/2012	v. 2.5.0	Added "Email Attachments" settings. Specify whether to group attachments in folders.
04/27/2010	v. 2.0.0	Added IMAP protocol. Added saving to Discussion Board.
12/09/2009	v. 1.1.0	Frequency of e-mail box checking is added to e-mail box settings.
11/20/2009	v. 1.0.0	First Release