

# SMTP Issues

## Troubleshooting Steps For Technician:

Answer the following questions:

1. Are they unable to set/update/remove their SMTP settings, or are they just not receiving emails?
  - a. If they're unable to update them in some way, please provide the error message they are receiving (from system logs or the dev console of the immediate error is non-specific).
  - b. When they attempt on [beta.efilecabinet.net](https://beta.efilecabinet.net) , is the issue still present?
2. Is it personal or account level SMTP?
3. Are you able to replicate?
4. If they are just not receiving emails, confirm that the test button has been clicked to confirm that they are valid.
  - a. Also check with the customer to confirm if their password was changed on that end.
5. Do they have IP address restrictions on their email address server?
6. Do they have any two-factor on their email settings?
7. Confirm if they have made any changes at all on their email end since the last time emails sent out successfully.

## If all troubleshooting has commenced and the issue is still present, grab the following information for the escalated ticket:

1. Provide answers to all of the above questions.
2. If it is determined they wish to delete their settings, provide the username of the affected user (or account owner) and provide their account ID (pulled from the Utopia Instances section of their account in the Hub), as well as the provider they're using/any additional SMTP setting info.
3. If they wish to delete, provide validation of their identity and their request to delete the settings in question.
4. If you are able to replicate and it appears to be a bug, include replication steps.

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Revision #1

Created 19 July 2022 13:47:07 by Bryce Holloway

Updated 19 July 2022 13:47:16 by Bryce Holloway