Mail server and email configuration

Simple Rule Configuration · https://extensionkit.unitfly.com/documentation/email-integration-mail-server-email-configuration/

Mail server

> **Note**:
>
> Starting from **v25.7.0**, the Mail Server configuration has been moved to **Environments**.
>
> After upgrading to v25.7.0 or higher, you must **re-enter the password** in the Mail Server settings under Environments, as migrated configurations may not send notifications until the password is updated.

Select the email server configured in Environments. You can assign a specific server to each rule group or define a default server to be used across all rule groups.

Action type

Defines which action the rule performs:

- **Send email**: Creates and sends an email notification. If selected, the additional configuring options are available in the E-mail section.
- **Process email objects**: extracts email data and attachments from configured objects. If selected, the additional configuring options are available in the Process email objects section.

Email

This section provides options to configure the email content and recipients. The following fields are available:

- Values from
- To
- CC
- BCC
- Subject
- Body
- Attachments

Values from

Action type: Send email > E-mail > Values from

Determines the source for expanding dynamic expressions in the subject, body, and recipient addresses.

- **Source (default)**: Expands dynamic expressions using data from the event trigger source.
- **Vault search**: Expands dynamic expressions using data retrieved from a vault search.

To

Action type: Send email > E-mail > To

This section provides options to configure recipient email address.

1. Expand the **To** section.
2. Click on **Add DynamicEmailAddress**.
3. Expand **DynamicEmailAddress [1]**.

The **Type** and **Value** fields are available by default.

Type

Action type: Send email > E-mail > To/CC/BCC > > Type

Specifies the recipient type. Based on the selected type, corresponding fields will appear for specifying the value.

- **Dynamic (default):** Email will be sent to dynamically resolved e-mail address.
- **User:** Email will be sent to the user's e-mail address as defined in M-Files Admin.
- **Group:** Email will be sent to all group members' e-mail addresses as defined in M-Files Admin.

Value

Action type: Send email > E-mail > To > Type: Dynamic > Value

Displayed when Type is Dynamic.

Defines the expression used to determine the recipient. This can be a static email address, or a property expression on the source object that resolves to an email address, a user, or a user group.

User

Action type: Send email > E-mail > To > Type: User > User

Displayed only when Type is User.

Select a recipient from the Users value list.

Group

Action type: Send email > E-mail > To > Type: Group > Group

Displayed when Type is Group.

Select a recipient from the User groups value list.

CC

The configuration options for CC recipients are the same as in the **To** section. You can specify recipients to be added to the CC using the same types—Dynamic, User, or Group—and follow the same steps for adding and managing email addresses. For a detailed description of the Type options, click here.

BCC

The configuration options for BCC recipients are the same as in the **To** section. You can specify recipients to be added to the BCC using the same types—Dynamic, User, or Group—and follow the same steps for adding and managing email addresses. For a detailed description of the Type options, click here.

Subject

Action type: Send email > E-mail > Subject

Specifies the subject line of the email that will be sent. It can be either static or dynamic. For dynamic subjects, you can reference object properties to automatically insert their values. For example:

"Contract %PROPERTY_{PD.ContractName}% is ready for review" will insert the value of the **ContractName** property into the subject line.

Body

This section provides options for configuring the email body.

1. Expand the **Body** section.
2. Click on **Add EmailBody**.
3. Expand **EmailBody [1]**.

The following fields are available: **Body, Type,** and **Body Type**.

Body

Action type: Send email > E-mail > Body > EmailBody > Body

Specifies the body of the email that will be sent. You can insert text along with placeholders to dynamically reference object properties, having their values displayed in the email body. This enables message customization with specific object data.

Type

Action type: Send email > E-mail > Body > EmailBody > Type

Choose the type of the body:

- **Static (default)**: Used for all notifications.
- **Dynamic**: Used only for digest notifications when the **Email type** is set to **SingleEmail**. This allows you to construct the body using values from multiple objects.

BodyType

E-mail > Body > EmailBody > BodyType

Specifies the body type of the email that will be sent.

- **PlainText (default)**: If this option is selected, the email body will be sent as plain text.
- **HTML**: If this option is selected, the email body will be sent as HTML.

Attachments

1. Expand the **Attachments** section.
2. Click on **Add Attachment**.
3. Expand **Attachment [1]**.

The **Mode** and **Filename wildcard** fields are available by default.

Mode

Action type: Send email > E-mail > Attachments > Attachment [1] > Mode

Defines how the attachment is selected from the vault.

- **CustomObject**: Select any custom object from the vault. When selected, the **Custom object** section and **Search timeout (sec)** field become available.
- **SourceObject**: Select the current source object.
- **Reference**: Select any reference to the source object. When selected, the **Reference expression** field becomes available.

Filename wildcard

Action type: Send email > E-mail > Attachments > Attachment [1] > Filename wildcard

Specifies the filename wildcard used to select a file from the object. The default value is *.

Custom object

Action type: Send email > E-mail > Attachments > Attachment [1] > Mode: CustomObject > Custom object

Displayed when Mode is CustomObject.

Specifies the conditions for finding the custom object. When expanded, the **Search conditions** field is available, allowing you to define an optional list of conditions that must be satisfied to find the custom object.

Search timeout (sec)

Action type: Send email > E-mail > Attachments > Attachment [1] > Mode: CustomObject > Search timeout (sec)

Displayed when Mode is CustomObject.

Defines the search timeout applied to object search operation, expressed in seconds. The default value is 0.

Reference expression

Action type: Send email > E-mail > Attachments > Attachment [1] > Mode: Reference > Reference expression

Displayed when Mode is Reference.

Defines the property reference expression to select the attachment from a related object.

Process email objects

This section provides configuration options for extracting email data and attachments. The following fields are available:

- Extract data from
- Email filename wildcards
- Save attachments
- Save properties

Extract data from

Action type: Process email objects > Process email objects > Extract data from

Defines which object contains the email file that will be processed.

- **Source**
- **Vault search**
- **Specify**
- **Reference**

Save attachments

Action type: Process email objects > Process email objects > Save attachments

Defines how email attachments are selected and saved. Available configuration options are: **Save type** (define whether to save all email attachments or only selected ones) and **Save to** (define where to save the selected email attachments).

Save properties

Action type: Process email objects > Process email objects > Save properties

Defines which email values are saved to M-Files properties.