UtRight Systems

SuiteCRM BCC Archive

Installation/Configuration Guide

BCC Archive 1

Outright

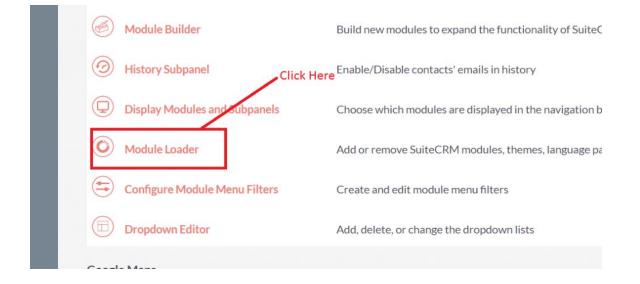
Pre-requisites

Please follow the below steps before installing the BCC Archive.

- **1.** Log in as an Administrator.
- **2.** Verify the CRM version should be compatible with BCC Archive.
- 3. install the BCC Archive .
- **4.** You must have an Inbound account to configure the BCC Archive.
- 5. Cron Job must be set up in CRM.

Installation Guide:-

- **1.** Go to the Administration page.
- 2. Click on "Module Loader" to install the package.



3. Click on "Choose File" button and select the BCC Archive.zip

| Name | ne Action Enable/Disable | | | Туре | Version | Date Installed |
|------------|--------------------------|-----------|---|----------|--------------|----------------|
| 6 1 | he BCC Ar | chive.zip |) | click on | upload after | select the |
| Select | / | Î | | | ive.zip file | |

4. Click on **"Upload**" to upload the file in CRM and then click on the Install button.

| Name | Action | Enable/Disable | Type | Version | Date Installed |
|--------|-----------|--------------------|----------------------------|-----------|----------------|
| | | | | | |
| | | Click I functio | nere to install onality | the BCC A | rchive |
| Module | le chosen | | PLOAD | | |

5. Again go to the Administration page and click on repair.

| ADMINISTRATION | SALES | MARKETING | SUPPORT | ACTIVITIES | COLLABORATION | ALL |
|-----------------------|--------------------|--------------|---------|------------|------------------------------|------------------------------|
| | \bigtriangledown | Backups | | Ва | ackup SuiteCRM files | |
| | | D Languages | | ck Here | ich languages are | available for users |
| | | 🕗 Repair | r | CI | heck and repair SuiteCRM | |
| | | B Global Sea | arch | Co | onfigure the global search o | ptions for the system |
| | | Diagnosti | c Tool | Ca | apture system configuration | for diagnostics and analysis |
| | | Connecto | irs | М | anage connector settings | |

6. Click on "Quick Repair and Rebuild" and click on execute button.

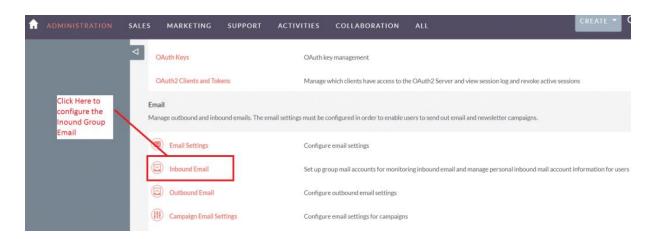
NOTE: After Installing each plugin, It is mandatory to repair and execute.

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Configuration Guide:-

- **1.** Go to the Administration page.
- 2. Click on the Inbound Email to configure the inbound email address.



3. Click on New Group Email Account, insert the all required information and checked Import emails Automatically.

| A | | SALES MARKETING | SUPPORT ACTI | VITIES COLLABOR | ATION ALL | |
|---|------------------------|----------------------|-----------------------------------|--|---|--------------------|
| | New Group Mail Account | 4 | | | | |
| 0 | | Note: To send record | assignment notifications, an SMTI | P server must be configured in <u>Er</u> | nail Settings. | |
| 0 | | HOME | Click here | | | |
| | | | [CASE:%1] | Set the macro which v Set this to any value, bu | vill be parsed and used to link imported e It preserve the "%1". | email to a Case. |
| | | Inbound Email | | | | |
| | | Name | : | | Туре | Mail Account Usage |
| | | Delet | E Selected: 0 | | | R. |
| | | O- DELET | Selected: 0 | | | к. К |
| | | | | | | |
| | | | | | | |

BCC Archive

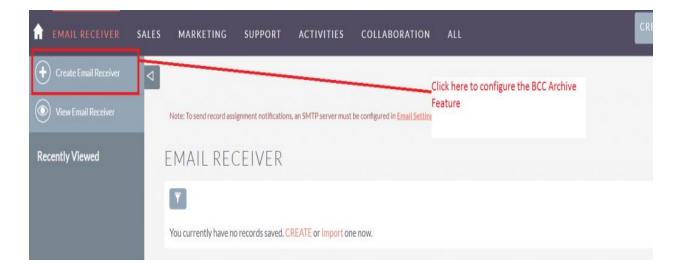
4. Click on "Test Settings", observe that "Connection completed successfully" should appear on Popup.

| 1 Test Settings | | Close | SUPPORT | ACTIVITIES | |
|---------------------------------------|-----------------------------|----------------------|-------------------------------------|-------------------------------|--|
| Connection completed successfu | ully. | | | | |
| New Bounce Handling Account | Note: To send record | l assign | iment notificat | tions, an SMTP server must be | |
| All Mail Accounts | SAVE | TEST SETTINGS | | | |
| Schedulers Click here, if you have | Mail Account Information | - | | | |
| inserted the correct | | | Prefill Gmail [™] Defaults | | |
| will appear | Name: * | Outright BCC Archive | | BCC Archive | |
| | Mail Server Address | :* | imap.gmail.com | | |

5. Again go to the Administration page and click on Email Receiver.

| Aavancea OpenAamin | |
|--|---|
| (AOS) AOS Settings | Change settings for Advanced OpenSales |
| AOD AOD Settings | Change settings for Advanced OpenDiscovery |
| AOP AOP Settings | Change settings for Advanced OpenPortal |
| Business hours | Restrict 'Only In The Scheduler' Workflows to launch only in certain days and times |
| Bugs Maintain a list of releases for your product. Active rele | ases are displayed in the Releases drop-down menus in bug records created within the Bugs module. |
| Eleases | Manage releases and versions |
| BCC Archive Configuration This section contains Email Reciever Cli | ick here |
| Email Receiver | Configure Bcc Archive |
| | |

6. Enter the name of the settings and select the configure Inbound group email.



7. Checked the Subject and Body checkbox, if you want to fetch the subject and body email address also.

| EMAIL RECEIVER | SALES | MARKETING | SUPPORT | ACTIVITIES | COLLABORATION | ALL | |
|-------------------------|-------|-------------------|----------|---------------------|--------------------------|---------------------|-----------------------------------|
| + Create Email Receiver | Þ | | | | | | |
| View Email Receiver | | CREATE | | | | | Type and select and |
| Recently Viewed | L | SAVE | L. | | | | Configured Inbound Group Email |
| | | BASIC | | | | | - |
| | L | Name:* | Out | ight Email Receiver | | Inbound Email: | Outright BCC Archive |
| | L | Subject Address C | Check: 🔀 | | | Body Address Check: | × |
| | | SAVE | L | | you want t email addr | | |