UtRight Systems

SuiteCRM BCC Archive

Installation/Configuration Guide

BCC Archive 1

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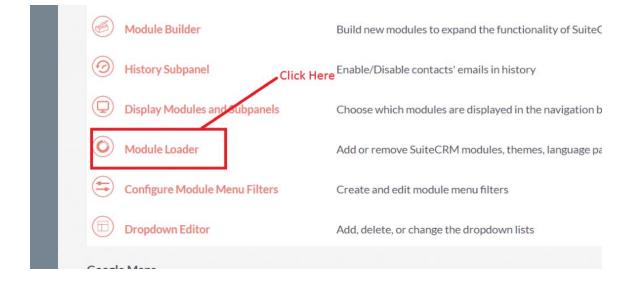
Pre-requisites

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.

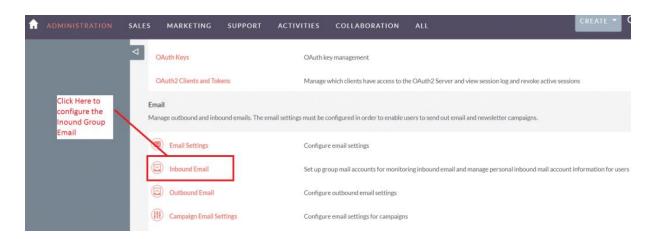
NOTE: After Installing each plugin, It is mandatory to repair and execute.

BCC Archive 4

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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

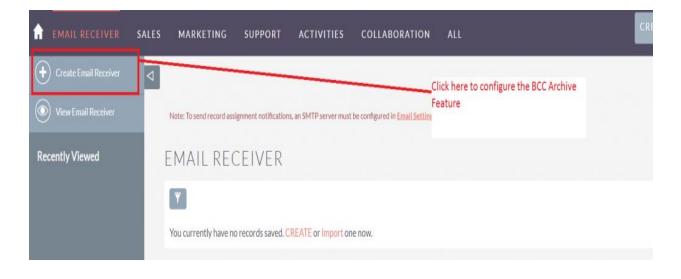
4. Click on "Test Settings", observe that "Connection completed successfully" should appear on Popup.

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		