

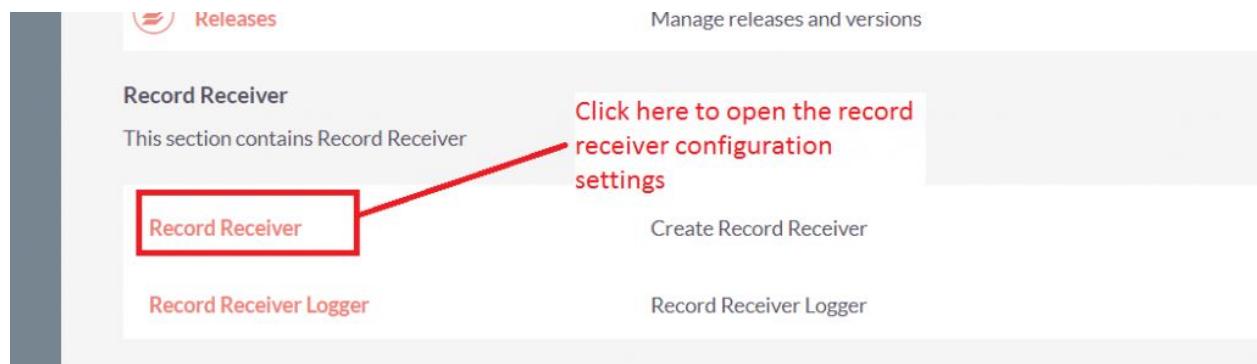


SuiteCRM Email2Lead

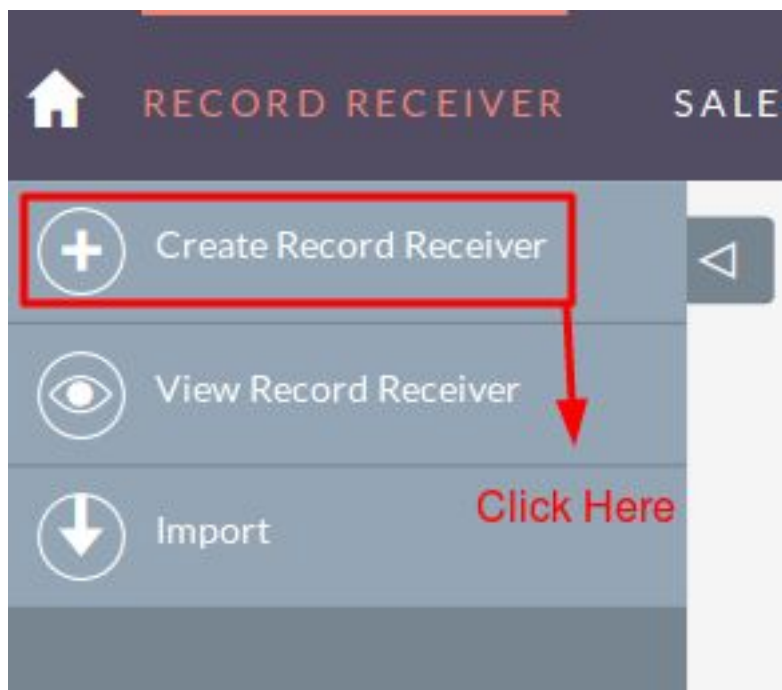
User Guide

User Guide:-

1. Go to the Administration page and click on Record Receiver.



2. Click on "Create Record Receiver" to configure the setting.



3. .Select the Group Inbound email for record receiver.

4. Select the mapper module to save the record like Lead.

SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

CREATE

SAVE CANCEL

BASIC

Name:*

Mapper Module:*

Inbound:*

Status: Active

Select the target module of email data parsing

Select the Inbound group email for record receiver

5. Select the fields for mapping and create the "Aliases" for the fields.

SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE Search...

BASIC

Name:*

Mapper Module:* Leads

Inbound:*

Status:

+

-

first_name First Name

last_name Last name

BODY EMAIL

Body Email:

Body Email Mapper:

Select the field name and set the alias/token of email

6. Checked the body email checkbox if you want to create the lead from body email address and set the alias for the email address.

Body Email: ☒ Body Email Mapper: Email Address

ASSIGNMENT RULE

Unassigned: ☐ Assigned to: [Field]

NOTIFICATION RULE

Admin: ☐ Email Address: [Field]

SAVE CANCEL

Note: If you are checking Body email mapper then must use the mapper because it is the mandatory Field.

7. Setup the assignment rule for the newly created record.

Mapper Module: [Field] Status: Active

Body Email: ☐ Body Email Mapper: [Field]

ASSIGNMENT RULE

Unassigned: ☒ Assigned to: [Field]

NOTIFICATION RULE

Admin: ☐ Email Address: [Field]

SAVE CANCEL

8. Setup the notification rule for the newly created record.

ASSIGNMENT RULE

Unassigned: ☒ Assigned to: Notify to any add-on email address

Checked for admin notify

NOTIFICATION RULE

Admin: ☐ Email Address: admin@outrightcrm.com

SAVE CANCEL

9. Click on save after configuring all settings.

SAVE CANCEL Click Here

BASIC

Name: Test Inbound email: ashish.negi@outrightcrm.com

Mapper Module: Leads Status: Active

+ - first_name Fname - last_name Lname

- description Description - phone_mobile Mobile

BODY EMAIL

Body Email: Body Email Mapper: Email

ASSIGNMENT RULE

Unassigned: Assigned to:

NOTIFICATION RULE

Admin: Email Address: Test@outrightcrm.com

SAVE CANCEL

10. Go to email and send mail to the setup inbound email with all mapped fields.

The screenshot shows an email draft window titled "Draft saved" with a timestamp of 10:10 AM. The email is addressed to "Administrator (ashish.negi@outrightcrm.com)". The body of the email contains the text "Create record Through Record receiver". A red rectangular box highlights the following text:

Email: test123@outrightcrm.com
Fname: John
Lname: Doe
Description: Hi I am testing
Mobile: 1201231205

A red arrow points from the bottom right corner of the red box to the text "Insert values like this". At the bottom of the draft window, there is a blue "Send" button and a toolbar with icons for text formatting, attachments, links, emojis, and images. A green circular icon with a white 'G' is visible in the bottom right corner of the draft window.

11. Go to Scheduler and check the "Check Inbound Mailboxes" job, the scheduler must be working for this functionality.

CHECK INBOUND MAILBOXES ☆

BASIC ACTIONS (10 of 14) PREVIOUS NEXT

Job Name:	Check Inbound Mailboxes	Status:	Active
Date & Time Start:	01/01/2015 17:00	Active From:	Always
Date & Time End:		Active To:	Always
Last Successful Run:	04/12/2019 15:38	Interval:	As often as possible.
Execute If Missed:	<input type="checkbox"/>	Job:	function::pollMonitoredInboxesAOP
Date Created:	04/10/2019 16:39 by admin	Date Modified:	04/10/2019 16:39 by admin

JOB LOG

Job Name	Job Status	Execute Time	Date Modified
Check Inbound Mailboxes	done	04/12/2019 15:38	04/12/2019 15:38
Check Inbound Mailboxes	done	04/12/2019 15:37	04/12/2019 15:37
Check Inbound Mailboxes	done	04/12/2019 15:36	04/12/2019 15:36

12. Go to selected mapper module and observe that the new record will create with all information

LEADS SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE

JOHN DOE ☆

OVERVIEW MORE INFORMATION OTHER ACTIONS

Name:	John Doe	Office Phone:	
Title:		Mobile:	1201231205
Department:		Fax:	
Account Name:		Website:	http://
Primary Address:		Other Address:	
Email Address:	test123@outrightcrm.com (Primary)		
Description:	Hi I am testing		
Assigned to:	admin		

Recently Viewed

- John Doe
- Check Inbound...
- test
- John
- John

NOTE: If you are using a free plugin and it works for you, please share your feedback and suggestions.