

# SuiteCRM Email2Lead

# Installation/Configuration Guide

Email2Lead

Outright

## **Pre-requisites**

Please follow the below steps before installing the Email Parser

- 1. Log in as an Administrator.
- 2. Verify the CRM version should be compatible with Email To Lead.
- 3. CRM should have the Outright utils version 10, if not then install the OutrightUtils package first then install the Email2Lead.
- 4. You must have a Group Inbound account to configure the Email Parser.
- 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 Record Receiver.zip.



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



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



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

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	<ul> <li>Ineronowing script win sync the database structure with the structure defined in the varders. Four have a using external database management tools, or to allow the administration module to run the script.</li> <li>NOTE: any changes you make to the script in the textbox will be reflected in the exported or executed compared to the script.</li> </ul>										
	<pre>/* Table : outr_fields_mapper */ /* MISSING TABLE: outr_fields_mapper (id char(36) NOT NULL ,name varchar(255) NULL ,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id char(36) NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0' NULL ,assigned_user_id char(36) NULL ,field_mapper_name varchar(255) NULL , PRIMARY KEY (id)) CHARACTER SET utf8 COLLATE utf8_general_ci; /* Table : outr_record_reciever_logger */ /* MISSING TABLE: outr_record_reciever_logger (id char(36) NOT NULL ,name varchar(255) NULL ,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id char(36) NULL ,created_by char(36) NULL ,description text NULL ,modified_user_id char(36) NULL ,created_by char(36) NULL ,PRIMARY KEY (id)) CHARACTER SET utf8 COLLATE utf8 general_ci;</pre>										
		/* Table : outr_record_reco /* MISSING TABLE: outr_r CREATE TABLE outr_reco ,date_entered datetime N NULL ,created_by char(36 ,assigned_user_id char(36 '0' NULL ,for_body_email I varchar(255) NULL ,emai ,inboud_email_id_value va KEY (id)) CHAR: TER SE	eiver */ record_receiver */ ord_receiver (id chai IULL,date_modified b) NULL,description ) NULL,unausign bi bool NoLL,status v Laddress varchar(2 Irchar(255) NULL, T utf8 COLLATE ut	Click r(36) NOT NULL determe NULL, htext NULL, deleted & ool DEFAULT '0' NULL varchar(255) NULL, be 255) NULL, user_id_c c mapper_module varch f8_general_ci;	c here to execute ve query bool DEFAULT '0' NULL .,to_admin bool DEFAULT ody_email_alias char(36) NULL ar(255) NULL , PRIMARY	2					

## **Configuration Guide:-**

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

A		SALES	MARKETING	SUPPORT	ACTIVITIES	COLLABORATION	ALL	CREATE - C
		⊲	OAuth Keys		OAuthk	ey management		
			OAuth2 Clients and Tol	kens	Manage	which clients have access to t	he OAuth2 Server and view session log and re	voke active sessions
	Click Here to configure the Inound Group	Er M	nail anage outbound and inb	ound emails. The e	mail settings must be o	onfigured in order to enable t	users to send out email and newsletter campai	gns.
	cinali	Email Settings	_	Configur	e email settings			
		(	Inbound Email		Set up gr	oup mail accounts for monito	ring inbound email and manage personal inbo	und mail account information for users
		(	Outbound Email		Configur	e outbound email settings		
		(	Campaign Email 5	ettings	Configur	e email settings for campaign	s	
		N.	Campaign Email 5	ettings	Configur	e email settings for campaign	S	

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

1 INBOUND EMAIL	SALES MARKETING	SUPPORT ACTIV	VITIES COLLABORATION	ALL			
New Group Mail Account	4						
New Bounce Handling Account	Note: To send record assignment notifications, an SMTP server must be configured in Email Settings.						
All Mail Accounts	HOME	Click here					
Schedulers	Case Macro:	CASE:%1]	Set the macro which will be parse Set this to any value, but preserve th	ed and used to link imported email ne "%1".	I to a Case.		
	Inbound Email						
	Name:			Туре	Mail Account Usage		
	D- DELETE	Selected: 0					
	O- DELETE	Selected: 0			10		

#### Email2Lead

4. Click on **"Test Settings"**, observe that **"Connection completed successfully**" should appear on Pop-up.

New Group Mail Account	4			
New Bounce Handling	Test Settings		Close nfigured in Email Settings.	
Account	N N			
O All Mail Accounts	Connection complete	ed successfully.	1	
	SAVE CAN	CEL TEST SETTINGS		
Schedulers	Mail Account	_		
Click here to check the	Information			
group Inbound email		Prefill Gmail <sup>™</sup> Defaults		
settings.	Name: *	Outright Record Receiver		Status:
"Connection completed successfully" message will	Mail Server Address: *	imap.gmail.com		User Name:
be appears on pop-up.	Mail Server Protocol: *	ІМАР		Password:
	Mail Server Port: *	993		Monitored F
		×		

NOTE: after installing each plugin, It is mandatory to repair and execute.