

SugarCRM BCC Archive Lite

User Guide

BCC Archive Lite

Outright

User Guide:-

1. Go to the admin panel and click on email archiver option.



2. Here you can see the inbound email address set as archiver.

📚 🕶 Product Catalog 👻 Cale	nder 🕶 Calls 👻 Meetings 👻 Tasks 👻 Notes 👻 Reports 👻 Leads 👻 Contacts 💌 Accounts 👻	Opportunities - Emails - Camp	oaigns + Targets +	Target Lists 💌	Email Receiver	I Search	۹ 🗿	2 - +				
Default automated Settings	2											
Edt *							0	(1 of 1)				
Name	Default automated Settings	Inbound Email: outrighterm18@gmail.com — This is Inbound email set as archiver email address										
Subject Address Check	2	Body Address Check	61									
Alert when sucessufily attached.		Last Email No.	97									
A Opportunity Level												
Attach in Opportunity (Not Close Lost	or Won):											
Skip These Sale	s Stages:											
A Regular Expressions								1				
Default REGEX:	$\label{eq:linear} $$ h^{-1}(-+,]w+)^{*}(w+)^{*}(-,]w+)^{*}(w+)^{*}(-,]w+)^{*}(w) = 0 $$ and a = 0 $$ and$											
RegEx Pattern First												
RegEx Pattern Second:												

3. Create two new records in Leads module.

📚 👻 Product Catalog 👻 Calendar 👻 C	alls 🕶 Meetings 👻 Tasks 👻 Notes	■ Reports ▼ Leads ▼ Co	iontacts 👻 Accou	ints 👻 Opportunities	• Emails • Campaigns •	Targets 👻 Target Lists 👻 Qu	otes 🕶 I Search	۹ 🗿	2 -	+
Leads (2)									Crea	ate <
Filter • Create ② Search by first name, last name									0	0
Select	-								-	- +
Enter new filter name	Created two records in lead	ls module						Reset	Cancel	Save
Vame •	Status Ø	Account Name	ice Phone 🔶 Ema	il o Use	t.	۰	Date Modified 0	Date Created		0
□ ✿ Leod 2	New		lead	12@gmail.com out	right SYSTEMS		04/06/2021 02:45pm	04/05/2021 02:43pm		ð •
□ ✿ Lead1	New		lead	i1@gmail.com out	right SYSTEMS		04/06/2021 02:43pm	04/05/2021 02:43pm		ð *

4. There is no record attached in Lead1 email sub panel as of now.

📚 * Product Catalog * Calendar * Calls * Meetings * Tasks * Notes * Reports	★ Leads ★ Contacts ★ Accounts ★ Opportunities ★ Emil	aalis 🕶 Campaigns 💌 Targets 👻 .	Target Lists 👻 Quotes 💌 🚺 Se	arch Q 🗿	? +
Le / Lead 1 🌣 Unconversed				1	Edit 👻 🤘
+ Title	(*	• Mobile			
+ Website	Do	Not Call			
+ Account Name		+ Tags			
Show more					
Related + All Filter All Records Search					0 🖩 0
© CALLS					+ *
(e) meetings					+ •
(b) TASKS					+ *
IN NOTES					+ •
CAMPAIGN LOG	No email attached yet				+ -
EMAILS (0)					+ -
From Subject	¢ Status	0 Date	Assigned To	Related To	٥
	No data available.				
😥 DATA PRIVACY					+ -

5. There is no record attached in Lead2 email sub panel as of now.

📚 🕶 Product Catalog 💌 Calendar 👻 Calls 👻 Meetings 👻 Tasks 💌 Notes 👻 Reports 👻 Leads	- Contacts - Accounts - Opportunities -	- Emails - Campaigns - Targe	ts 👻 Target Lists 👻 Quotes 👻 🖠	Search	a 💿 🤶	- +
Le Lead 2 12 Unconverted					< > Ed	dit 👻
+ Title		+ Mobile				
+ Website		Do Not Call				
+ Account Name		+ Tags				
Show more						
Related - All Filter All Records Search					0	•
© CALLS						+ -
6 MEETINGS						+ -
Tasks						+ •
No email attache	d yet					+ •
CAMPAIGN LOG						+ *
EMAILS (0)						+ -
From Subject	ф Status	ф Date	Assigned To	Related To		٥
	No data available.					
DP DATA PRIVACY						+ -

6. There is no record attached in Contact Test's email sub panel as of now.

寒 🔹 Product Catalog 👻 Calendar 💌	Calls - Meetings - Tasks - Notes - Reports - Leads	s • Contacts • Accounts • Opportunities • Emails •	Campaigns 👻 Targets 👻 Target Lists 👻	Quotes - I Search	a 💿 🤶 -
Co contact test ☆					Edit 👻
+ Title		+ Mobile			
+ Department		Do Not Call			
+ Account Name		Email Address	contact@gmail.com		
+ Tags					
Show more					
Related + All Filter All Records Search					C 🖩 O
CALLS					+ -
MEETINGS					+ -
) tasks					+ -
NOTES					+ -
E) LEADS	No email attached yet				+ -
					+ -
EMAILS	1				
From	Subject	d Status d	Data & Attimad I	A Detund To	

BCC Archive Lite

Outright

7. In the process audit, there is no record yet.



8. Insert archiver email in BCC. Enter Lead & Contact in Subject and Body respectively.



9. Go to the process audit and refresh page. Her you'll see fetched email.



10. In detail view, you can see all targeted emails and linked module.

寒 👻 Product Catalog 👻 Cale	ndar 🕶 Calls 🕶 Meetings 🕶 Tasks 🕶 Notes 🖛 Reports 🖛 Leads 🖛 Contacts 🖛 Ac	counts • Opportunities • Emails • Camp	aigns 👻 Outright BCC Archive Process Audit	I Search	a 🔘 🤶 - 🕇
sharma.mohit@outrightcrm.c	om -> To ->outrightcrm18@gmail.com 🚔				
Edit *					(1 of 1)
Sender.	sharma.mohit@outrightcrm.com -> To ->outrightcrm18@gmail.com	Email Number:	98		
Date Created	04/06/2021 12:25pm by outright SYSTEMS	Date Modified:	04/06/2021 12:25pm by outright SYSTEMS		
Complete Work Audit:	Leads ⇒ <u>Lead 2</u> Contacts ⇒ <u>contact test</u> Leads ⇒ <u>Lead 1</u>				
Modified Count					
Record Count	3	Opportunity Count:	0		
All Targeted Email Addresses:	Isad2@pmail.com contrsdgmail.com outrightmit78gmail.com outrightmit78gmail.com Assama nontPigonightm.com CAKSLo20JpBhmf13FbbRjYf7peNdusvacYT14Y08xP0m7PxcSQ@mail.gmail.com Isad1@pmail.com				

11. Email is attached to the Lead 1.

📚 👻 Product Catalog 👻 Calendar		Tasks 🕶 Notes 👻 Rep	orts 👻 Leads 👻	Contacts + Accour	ts 🔹 Opportunities	▼ Emails ▼	Campaigns 👻	Targets 👻 Tar	get Lists	• Quotes • I	Sear	rch	۹ (9 🤶	- +
Le Lead 1 🌣 Unconversed														E	dit 👻
(+ Title)						+ Mobile									
+ Website						Do Not Call									
+ Account Name						+ Tags									
Show more															
Related = All Filter All Records Search														0	
CALLS															+ -
MEETINGS															+ -
Tasks															+ -
NOTES															+ -
CAMPAIGN LOG	г	Email is attached su	Iccessfully	1											+ $+$
Em EMAILS (1)	L														+ $-$
From	Subject			۰	Status	۰	Date		é Assign	ed To	•	Related To			٥
රු sharma.mohit@outrightcrm.com	Test Subject lead2@gmail.	om			Archived				outrig	ht SYSTEMS					۲
D DATA PRIVACY															+ -

12. Email is attached to the Lead 2.

Le Lead 2 🌣 Unconverse	d.							Edit 👻
+ Title			+ Mobile					
+ Website			Do Not Call					
+ Account Name			+ Tags					
Show more								
Related - All Filter All Records Search								2 🖩 0
CALLS								+ -
MEETINGS								+ -
Tasks								+ -
N) NOTES								+ •
CAMPAIGN LOG								+ -
EMAILS (1)	Email is attached succe	essfully						+ -
From	Subject	Stetus	Date	۰	Assigned To	٥	Related To	o
ර් sharma.mohit@outrightcrm.com	Test Subject lead2@gmail.com	Archived			outright SYSTEMS			۲
DATA PRIVACY								+ -

13. Email is attached to the Contact Test.

📚 🔹 Product Catalog 👻	Calendar 🕶 Calls 👻 Meetings	• Tasks • Notes •)	Reports - Leads - Co	ntacts 👻 Accour	ts • Opportunities		Campaigns 🕶 Targets	• Targ	et Lists 💌	Quotes 🕶 🕯	Search	Q	0	2 -	+
Co contact test 🔅														Edit	
+ Title						+ Mobile									ì
+ Department						Do Not Call									
+ Account Name						Email Address	contact@gmail.com								
+ Tags															
Show more															
Related - All Filter All Record	s Search													c 🔳 🤅	5
CALLS														+ -	-
MEETINGS														+ -	
TE) TASKS														+ •	
NOTES														+ -	
() LEADS														+ -	
		Email is attache	d successfully											+ •	
Emails (1)														+ -	
From	Subject			٥	Status	۰	Date	0	Assigned To		Related To			٥	
☆ sharma.mohit@outrig	htorm.com Test Subject lead2@gma	Loom			Archived				outright SY	STEMS				۲	