

SuiteCRM Smart Email Researcher

User Guide

Email Researcher

Outright

User Guide:-

1. Go to admin panel and click on the global search setting option. From here you can select the location of search bar.

\equiv administration \checkmark	\equiv administration -	
create → Q 🙆 A	Global Search Settings Global Search Settings	
Global Search Box Configure	Global Search Box Configure Global Search Box Configure	
Global Search Box in Id:	Outright License Keys Outright License Keys	
Global Search Box in Class:	Put License Keys here Put License Keys here	
Global Search Icon Switch: Off(Default)	Outright Store Outright Store Right now the pr	osition of search box is at bottom right corner
© Supercharged by SuiteCRM © Powered By SugarCRM	© Supercharged by SuiteCRM © Powered By SugarCRM @ Server respo	nse time: 0.11 seconds.

2. Right now we changed location to the top middle section.



3. In the configuration settings you can edit the name and enable/disable the plugin.



4. Go to the Accounts Module and compose the email from there.

OMPOSE EM/	AIL –		Search in Emails		CREATE	- Q (4) (2)
Open the	record in Accounts Module and compose an email					
Email Template:	Related To: Account	TESTEMA	IL SEARCH PRC	DUCT		
R ×	Test Email Search Product	OVERVIEW	MORE INFORMATION	OTHER ACTIC	ons 🔻	< (1 of 1) >
From:	SuiteCRM (Reply-to: SuiteCRM <outrightcrm3@gmail.com>, From: SuiteCRM <outrightcrm3@gmail.com>)</outrightcrm3@gmail.com></outrightcrm3@gmail.com>	Name:	Test Email Search Product	Office Phone:	8888888888	
To:	Test Email Search Product <testproduct@gmail.com></testproduct@gmail.com>	Website:	http://	Fax:		
Cc:	sharma.mohit@outrightcrm.com	Email Address:	testproduct@gmail.com (Primary)			
Bcc:	vijay@outrightcrm.com	Billing Address:	CODY	Shipping		CORV
Subject:	Test - Email Search product		сорч	Address:		COPY
Body:	Email Search Product For SuiteCRM	Description:				
		Assigned to:	admin			

5. The email is successfully attached to the customer history and delivered to the recipient.

	← 🖸		Email Address:	testproduct@gmail.co	m (Primary)		
3	Tes	st - Email Search product 🧃	Billing Address:	C	OPY	Shipping Address:	СОРУ
	Suit to Te	eCRM 10:08 AM (9 minutes ag ist, me 👻					
	from:	SuiteCRM <outrightcrm3@gmail.com></outrightcrm3@gmail.com>	Description:				
	reply-to:	SuiteCRM <outrightcrm3@gmail.com></outrightcrm3@gmail.com>	Assigned to:	admin			
	to:	Test Email Search Product <testproduct@gmail.com></testproduct@gmail.com>	Emai		tached to the	history and d	alivered
	CC:	sharma.mohit@outrightcrm.com	Emai	i is successibility att	lached to the	history and u	envereu
	date:	May 18, 2021, 10:08 AM	✓ ACTIVITIES				
di	subject:	Test - Email Search product	0			_	
	mailed-by:	gmail.com	49 HISTORY				
	signed-by:	gmail.com	Subject		Status 🗢	Contact	Category ⇔
	security:	Standard encryption (TLS) <u>Learn</u> more	Create Note or Attach	ment			(1-2 of 2) >
			+ Test - Ema	ail Search product	Sent		Edit 🛩

6. You can use from, to, CC, BCC, Email Address for searching the customer email. Here we are using the subject for the purpose.

≡ emails √ s	earch in Emails	E HOME ↓ Tes	st - Email Sear V Test - Email S	ch product Search product		CF	REATE - Q (A)
TEST - EM	AIL SEARCH PRODUCT 🟠	SUITECRM DASI	HBOARD	ACTIONS 👻	Copy the sub	ject line and	paste it into search b
EMAIL ACT	ions 👻	💊 MY CALLS	5				✓ ① ×
Opt In:		Close Subje	ect ⇔	Related to	Start Date ⇔	Accept?	(0 - 0 of 0) Status ⇔
From:	outrightcrm3@gmail.com	No Data					
To:	testproduct@gmail.com		INGS				≠ 0×
Cc:	sharma.mohit@outrightcrm.com	Close Sub	bject 🔶	Related to	Start Date	¢	(0 - 0 of 0)
Bcc:	vijay@outrightcrm.com	No Data					
Subject:	Test - Email Search product	📍 МҮ ТОР О	OPEN OPPOR	TUNITIES			≠ ⊖ ×
Body:	Email Search Product For SuiteCRM	Opportunity Name	ie ⇔	Account Name	Amount 🔶	Expected C	(0 - 0 of 0) Iose Date ⇔
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