

SuiteCRM Email to Lead

User Guide

Email to Lead

Outright

User Guide:-

1. Click here to see and edit all existing inbound settings.

| | CREATE - Q (A) (A) = INBOUND S | ETTINGS 🗸 | |
|---|--|---|---------------------|
| Releases Manage releases and versions | OUTRIGH | TCRM14@GMAIL.COM » EDIT | |
| Record Receiver This section contains Record Receiver | SAVE CANC BASIC | EL VIEW CHANGE LOG Enter all the necessary inform | mation < (1 of 1) > |
| Inbound Settings Create New Inbound Settings | Email Address a Archiver.* | ; outrightcrm14@gmail.com Email Password: • | |
| Inbound Settings Self All Inbound Settings Click here to see and edit all existings | ting inbound settings Fetch Emails:* | e INBOX Status: | 07/20/2021 |
| Email Manager for receiver archiver Record Receiver Manager | IMAP CONFIGURAT | Select Date: | - |
| Email To Lead Receiver Create Record Receiver | Mail Server Add (e.g imag.gmail.com) | ress imap.gmail.com | |
| Email To Lead Logger Record Receiver Logger | Mail Server Port(143/993);* | 993 Mail Server Protocol St (tts/ss);* | si |
| Email/Ziead Process Audit Process Audit | SAVE CANC | EL VIEW CHANGE LOG | |

2. From here, you can choose the target module and email address.

| \equiv email to lead receiver $-$ | | | AD RECEIVER 🗕 | | | create - Q | 90 |
|---|---|-----------------|------------------------|---------------------------------|--------------------------|---|-------|
| Default Target:* Status: Take New Fields from Field Mapper: | Emailtolead Name:* Default automated Settings foroutrigh Target Email Address:* | DEFAULT A | AUTOMAT HTCRM14 | ED SETTING: @GMAIL.CON | S FOR- 1 | | |
| TESTING PANEL | - | Default Target: | Leads | | Emailtolead Name: | Default automated Settings for- >outrightcrm14@gmail.com | |
| Email Example: | From here, you can choose the target module and email address | Status: | Active | | Target Email Address: | outrightcrm14@gmail.com | |
| CUSTOMER SOURCE SETTINGS(EMAIL MAPPER) | - | TESTING PANEL | SETTINGS(EMAIL MA | APPER) | | | + |
| No Email Key: | Pull Customer Email | EMAIL2LEAD PRO | ON CESS AUDIT | These are the field | mappers we | created for parsing data | • |
| Body Email Mapper: Mail | | OUTRIGHT:FIELD | MAPPER FOR EMAI | L2LEAD | | | - |
| | | Field Name 🕀 | Select Field \ominus | Map With Limail Label \ominus | Default Val | ue ^(c) Date Modified ^(c) | |
| DUPLICATE DETECTION | + | Create | | | | 🔣 💽 (1-3 of 3) | |
| | | Mapper Field | email1 | Mail | | 07/21/2021 07:05 Ed | lit 🕶 |
| Email Sender + Subject: | | Mapper Field | website | Web1 | www.google.c | com 07/21/2021.06:22 Ed | it 🕶 |
| Check Duplicate on | | Mapper Field | department | Dep | | 07/19/202109:19 Ed | át 🗸 |
| Phone Numbers: | | LBL_OUTR_EMAIL | _MANAGER_OUTR_ | RECORD_RECEIVER_1_FROM | M_OUTR_EMAIL_N | MANAGER_TITLE | + |
| SAVE CANCEL VIEW CHANGE LOG | | | | | | Activate Windows | |

Email to Lead

3. Right now process audit and Leads Module are empty.

| ■ EMAIL2LEAD PROCESS AUDIT | create • 0, @@ | |
|--|----------------|--|
| EMAIL2LEAD PROCESS AUDIT | re empty | |
| Security Groups: Mass Assign ASSIGN REMOVE Group: -None 💌 | | Security Groups: Mass Assign ASSIGN REMOVE Group: -None 💌 |
| © Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 1.09 seconds. | BACK TO TOP A | © Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 0.67 seconds. BACK TO TOP ▲ |

4. Enter inbound email address in "to" field and field mapper in email body with correct values.

| Email two Lead | _ 2 × |
|--|----------|
| outrightcrm14@gmail.com | |
| Email two Lead | |
| Name : Email Test Office Phone : 9898989898 | |
| Dep : Sales Department Web1 : <u>www.testproduct1.com</u> Mail : <u>Testlead12@gmail.com</u> | |
| | |
| Enter inbound email address in "To" field and field ma email body with correct values | ppers in |
| | |
| Send 🔻 🎋 <u>A</u> 🗓 🖙 😁 🛆 🗖 🖍 | : 🖬 |
| | |

Email to Lead

Email to Lead

5. A record is automatically created in the Leads Module.

| | create • Q @@ | \equiv email2lead process audit $ abla$ | |
|---|-----------------------------------|--|--|
| LEADS A record is automatically created in the Leads Module | | EMAIL2LEAD PROCESS AUDIT | |
| Name 🗢 Status 🗢 Account Name 🗢 Office Phone 🗢 | Email | Email2Lead Process Audit 🗢 🛛 Route ID 🗢 | Parent ID 💠 Parent Type 🗢 Date Created 🗘 |
| | 1-1a(1) 💽 💽 | | (1-1of 1) |
| ✓ Enul Test New 900000000 □ Est accretion ¥ Ξ | Testlead12@gmail.com i (1-1 of 1) | CLICK TO VIEW RECORD Process Auit for Default automated Settings for- vourigitorm140gmail.com For module : | 2e60efc9-dd4a- 6434-e875- Leads 07/21/202111:53 60180a05602e |
| Security Groups: Mass Assign ASSIGN REMOVE Group: -None- 🔻 | | | (1-1of1) |
| © Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 1.12 seconds. | BACK TO TOP | Security Groups: Mass Assign ASSIGN REMOVE | Group:None |
| | | © Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time | e: 1.11 seconds. BACK TO TOP 🔺 |

6. A fields are parsed into there respective columns.

| | | 4 |
|--|---|---|
| EMAIL TEST | LEADS | |
| OVERVIEW MORE INFORMATION OTHER ACTIONS - | Name Ø Status Ø Account Name Ø Office Phone Ø Email Øvr Ørder dertour. V III Øvr Ørder dertour. V III | |
| Job Title: Mobile: | P East New Method 128grad.com Orr Construction Y ■ | i |
| Account Name: Website: www.testproducti.com Primary Address: Other Address: | Security Groups: Mass Assign ASSIGN REMOVE Group: -None- | |
| Email Address: Testinad12@gnail.com (Princry) | Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 3.15 seconds. BACK TO TOP | * |
| Description: | | |
| | | |
| | | |
| Subject \oplus Status \oplus Contact Category \oplus Create Note of Attachment - | 1 | |
| CAMPAIGNS CAMPAIGNS | | |

Email to Lead

7. This time enable both of these switches.

| = | EMAIL TO LEAD | RECEIVER | - | | CREATE - Q @ @ | | AD RECEIVER 🚽 | • | | CREATE - | 9. |
|---|----------------------------|-----------------------|---------------------|--|---|-------------------|-------------------|------------------------|--------------------------|--|-----------|
| | Default Target:* | Leads | | Emailtolead Name:* | Default automated Settings for->outrigh | | | | | | |
| | Status: | Active | | Target Email Address:* | outrightcrm14@gmail.com | DEFAULT A | | FED SETTINGS | FOR- | | |
| | Take New Fields from | × | | | - | >OUTRIGE | HCRM14 | @GMAIL.COM | | | |
| | Field Mapper: | | This time enable bo | th of these switches | | \$ | | | | | |
| | TESTING PANEL | | | | - | BASIC ACTIO | DNS - | | | | |
| | | | | | | Default Target: | Leads | | Emailtolead | Default automated Settings I | or- |
| | Email Example: | | | | | | | | - Harrison | -out gritering eginancom | |
| | | | | | | Status: | Active | | Target Email Address: | outrightcrm14@gmail.com | |
| | | | p. | | | | | | | | |
| | | | | | | TECTING DANIEL | _ | | _ | | |
| | CUSTOMER SOURCE SE | ITINGS(EMAIL | MAPPER) | | - | TESTING PANEL | | 10000 | | | - |
| | | | | | × | CUSTOMER SOURCE | SETTINGS(EMAIL M/ | APPERJ | | | |
| | No Email Key: | | | Pull Customer Email from FromEmail: | 10 | DUPLICATE DETECTI | ON | | | | + |
| | Body Email Mapper: | Mail | | | _ | EMAIL2LEAD PRO | CESS AUDIT | | | | + |
| | | | | | | OUTRIGHT:FIELD | MAPPER FOR EMAI | IL2LEAD | 100 | | - |
| | DUPLICATE DETECTION | | | | + | Field Name 🕀 | | Map With Email Label 🕀 | Default Val | ue ^(c) Date Modified ^(c) | |
| | | | | | | Create | | | | | lot3) 💽 🔛 |
| | Email Sender + Subject: | | | | | Mapper Field | email1 | Mail | | 07/21/2021 07:05 | Edit 🕳 |
| | Check Duplicate on | | | | | Mapper Field | website | Web1 | www.google.c | com 07/21/202106:22 | Edit 🛩 |
| | Phone realiders. | | | | | Mapper Field | department | Dep | | 07/19/2021 09:19 | Edit 🛩 |
| | SAVE CANCEL | VIEW CH | ANGELOG | | | LBL_OUTR_EMAIL | MANAGER_OUTR_ | RECORD_RECEIVER_1_FROM | OUTR_EMAIL_M | ANAGER_TITLE | + |
| | | and the second second | | | | | | | | Activate Windo | |

8. Enter Inbound Email into "to" field and enter mapper in email body.



9. New record is created in the leads module.

| ≡ LEADS v | CREATE - 🤇 🖉 🙆 | EMAIL2LEAD PROCESS AUE | DIT 🚽 | | CREA | NTE 🕶 🔍 🕘 🙆 |
|---|---|---|---|--|------------------------|------------------|
| LEADS New record is created in the leads module | | EMAIL2LEAD PROC | CESS AUDIT | | | |
| Name \Leftrightarrow Status \Leftrightarrow Account Name \Leftrightarrow Office Phone \Leftrightarrow | Email | Email2Lead Process Audit | Route ID \ominus | Parent ID 🖯 | Parent Type \varTheta | Date Created 🗢 |
| | 📔 💽 (1-2 of 2) 💽 📝 | Ov Bust Across 7 🔳 | | | | (1 - 2 of 2) |
| / Email2.Load New 900000000 / EmailTest New 900000000 // EmailTest New 9000000000 | outrighterm14@gmail.com i Testlead12@gmail.com i | CLICK TO VIEW RECORD | Process Auit for Default automated Settings for- >outrightcrm14@gmail.com For module : | d0be0ef2-2649- bfa7-887b- 60f80cd5ab06 | Leads | 07/21/2021 12:01 |
| Security Groups: Mass Assign ASSIGN REMOVE Group:None | - (1-203) | CLICK TO VIEW RECORD | Process Ault for Default automated Settings for- >outrighterm14@gmail.com For module : | 2e60efc9-dd4a- 6454-e8f5- 60f80a05602e | Leads | 07/21/2021 11:53 |
| | | 🗣 BREACTORY 🕇 🗮 | | | | (1-2 of 2) |
| © Supercharged by SuiteCRM © Powered By SugarCRM @ Server response time: 2.73 seconds. | BACK TO TOP A | | | | | |
| | | Security Groups: Mass Assign | SSIGN REMOVE | Group:None- | ~ • | |
| | | © Supercharged by SuiteCRM © Powered By Sug | arCRM Q Server response time: | 4.43 seconds. | | ВАСК ТО ТОР 🔺 |

10. All fields are successfully mapped.

| 😑 LEADS 🗸 | | | | | | |
|--|-----------------------------------|----------------|---|------------------------|--|------------------------|
| EMAIL2 LEA | All fields are succes | sfully mapped | | | L2 LEAD 🏠 | |
| Name: | Email2Lead | Office Phone: | 9898989898 | Opt In: | | |
| Job Title: | | Mobile: | | From: | outrightcrm14@gmail.com | |
| Department: | Sales Department | Fax: | | To: | outrightcrm14@gmail.com | |
| Account Name: | | Website: | www.google.com | Cc: | | |
| Primary Address: | | Other Address: | | Bcc: | | |
| Email Address: Description: Assigned to: | outrighterm14@gmail.com (Primary) | | | Subject: Body: | Test Email2 Lead Name : Email2 Lead Office Phone : 9898989898 Der : Sales Department Web 1 : www.testproduct.com Mail :Testlead12@gmail.com | |
| r sagres ter | | | | Related To: | Email2 Lead | |
| | | | | Date Created: | 07/21/2021 12:01 by admin | |
| ~ ACTIVITIES | | | + | Date Sent/Received: | | Date Sent/Received: |
| 4) HISTORY Subject | t ⇔ Status ⇔ | Contact (| ⊂ Category ⊕ ⓒ ⓒ (1-10 of 53) > अ | Category: | | |
| + 🔀 Test Em | ali2.Lead Read | | Edit 👻 | | | |