



SuiteCRM Email To Case

Installation Guide

1. Go to Module Loader.
2. Click on the Upload button.
3. Choose the *outr_email_to_anything* zip file that you downloaded from OutRight Store.
4. Click on the Install button.
5. Click on Commit.
6. After that, you should see a message “Congrats! Your license is automatically activated. The extension is ready to Use!!!”

Note: In case the license is not automatically verified

Go to Admin. In the OutRight Email to Anything section, select Step 1 i.e. Activate Product License.

1. Get the license key from store.outrightcrm.com/my-account/license-page
2. Enter the License Key.
3. Click on Validate.
4. Refresh the Page.

Installation is completed here next we'll move to configuration.

Configuration

Inbound Email Configuration

Pre-requisites

- App Password
- Enable IMAP

Generate Email App Password

First of all, you need to generate an App Password for the email you will use in Email to Anything. Follow the below instructions for this.

1. Open the Google Account
2. Next, in the left panel, click on the Security option.
3. After that make sure the 2-Step Verification is ON.
4. If 2SV is active, you will be able to see the “App Passwords” option.
5. You need to click on the “App Passwords” option.
6. Here, you will be required to provide the email password.
7. After that, you’ll be redirected to the App Passwords page.
8. In the “Select App” dropdown, choose Custom and enter the name of the application e.g. SuiteCRM.
9. Next, click on the Generate button.
10. You will be able to see 16 digits password. (Copy and Paste it in a safe place because you won’t see that again).

Video on How to Generate an App Password: <https://youtu.be/YLPEY57WV3c>

You should use this password every time you create an inbound setting in SuiteCRM.

Enable IMAP

1. Open the Gmail
2. Click on the Settings icon at the top right corner.
3. In the Quick Setting Subpanel, click on the “**See All Settings**” option.
4. The next window will show you various settings. Here, go to the “**Forwarding and POP/IMAP**” section.
5. Here, you need to select the **Enable IMAP** option and then click on the **Save Changes** button at the bottom.

Email to Anything - Inbound Email Setting

Please Make sure you are in the OutRight Inbound Email Module not in the one that SuiteCRM provides by default.

1. Click on the Create New Inbound Settings option.

Email to Anything by Outright Store

Create Email To Lead or anything

Step1:	Create Inbound Email Settings From Here	Activate License
Step2:	Create New Inbound Email Settings	
Step 3:		Review All Inbound Settings
Step 4:		Change Default Receivers
Email Manager for receiver archiver		Record Receiver Manager
Logger module for record receiver		Record Receiver Logger
Email2lead Process Audit		Process Audit
Live Test		Click here for Live Email Testing

2. After that, you need to fill up the following fields.

SAVE CANCEL VIEW CHANGE LOG < PREVIOUS (1 of 1) NEXT >

BASIC

Email Address as Archiver:*	<input type="text" value="outrightcrm16@gmail.com"/>	Email Password:*	<input type="password" value="*****"/>
Target Folder (e.g. INBOX):	<input type="text" value="INBOX"/>	If Custom Date , then Select Date:	<input type="text" value="06/29/2023"/>
Status:	<input checked="" type="checkbox"/>		

IMAP CONFIGURATION

Mail Server Address (e.g. imap.gmail.com):	<input type="text" value="imap.gmail.com"/>	Mail Server Protocol (tls/ssl):*	<input type="text" value="ssl"/>
Mail Server Port(143/993):*	<input type="text" value="993"/>		

- a. **Email Address as Archiver:** Here, you need to enter the email address from which you would like to parse/extract data.

- b. Email Password:** In this enter the “App Password” for that particular email. In the above section, we have shown you how to generate an App Password.
- c. Target Folder:** Enter the name of the Email folder. After that, emails in that particular folder will be parsed.
- d. Select Date:** Choose the date from where you want to start parsing emails.
- e. Email Server Address:** Enter the IMAP server address. For Gmail, it’s “*imap.gmail.com*”
- f. Email Server Port:** In this field, Enter “**993**”.
- g. Email Server Protocol:** It would be “**SSL**”.

Once all the fields are filled, click on the **Save**.

Afterward, you should be able to see a Validation Message.

