



SuiteCRM Email To Case

User Guide

Email to Anything Receiver Setting

1. Click on Step-4 i.e. View Receiver Setting.

Email to Anything by Outright Store

Create Email To Lead or anything

Step1:	License Activated
Step2:	Create more Inbound Email Settings
Step 3:	Review All Inbound Settings
Step 4:	Change Default Receivers

2. Here, you'll see an "AutoMatically Generated Receiver For {example@email.com}". Click on the pencil icon to go to Edit View.

EMAIL TO LEAD RECEIVER

Emailtolead Name	Status	Default Target	Field Value Separator	Secondary Target
<input type="checkbox"/> AutoMatically Generated Receiver For [outrightcrm31@gmail.com]	Active	Contacts	::	Cases

3. This is the Basic Configuration of the receiver.

AUTOMATICALLY GENERATED RECEIVER FOR {OUTRIGHTCRM31@GMAIL.COM} ✕

BASIC	Switch Values	Dynamic Targets (Primary)	Assignment Rules	ACTIONS ▾	< PREVIOUS	(1 of 1)	NEXT >
Primary Target:	Contacts	Secondary Target:	Cases				
Emailtolead Name:	AutoMatically Generated Receiver For {outrightcrm31@gmail.com}	Target Email Address:	outrightcrm31@gmail.com				
Status:	Active	Field Value Separator:	::				

- Primary Target:** Select the primary module in which you want to save data and create records. In this case, it will be either contacts or accounts.
 - Secondary Target:** Select the secondary module in which you want to save data and create records. In this case, it will be cases.
 - Receiver Name:** Give a befitting name to the receiver setting.
 - Target Email Address:** This receiver setting is applied to the email address mentioned here.
 - Field value separator:** This is a key value separator e.g. Name: John. By default, it's colon (::), you can change it as per need.
 - Status:** You can activate or deactivate the receiver using the status dropdown.
- Click on the **Save** button after completing the basic configuration.

Send First Email

- Compose a new email.
- In TO, enter the inbound email address that you configured in SuiteCRM Email to Anything.
- Sample email body-

Sample Email
From: sharma.mohit@outrightcrm.com (Mohit Sharma)
To: support@abcelectronics.com
Subject: Smartphone Issue - Urgent Help Needed! Hello ABC Electronics Support Team, I hope this email finds you well. I am facing an urgent issue with my smartphone, model XYZ-123. The touch screen is not responding properly, and the battery seems to drain very quickly. I have tried restarting the phone, but the problem persists. I depend on my phone for work, so I need this issue resolved as soon as possible. Please help!

Best regards,
Mohit Sharma

4. Send this email.
5. Wait for a few seconds and check the selected module.
6. A record will be automatically created in the Contacts and one related case. Check the screenshot below.

The image displays two side-by-side screenshots. The left screenshot shows a Gmail email interface with the subject "Smartphone Issue - Urgent Help Needed! [CASE:18]". The email content includes a "Customer Support" header, a timestamp of "5:10 PM (4 minutes ago)", and a message from "Mohit Sharma". The message body contains instructions for replying to the ticket, a list of information to provide (e.g., "A detailed description of the issue", "General information about the project", "Firmware/Software versions", "Configuration backups", "Logging information such as event logs, icx logs, application logs, wireshark traces, etc."), and ticket details: "Ticket ID: OTM-18", "Subject: Smartphone Issue - Urgent Help Needed!", "Department: Technical Support", "Status: New", and "Priority: Medium". At the bottom, there are three buttons: "No, I did not.", "Yes, it is working.", and "I will send you the details."

The right screenshot shows the SuiteCRM interface. The top section is the "CONTACTS" module, displaying a table with columns for Name, Job Title, Account Name, Email, and Office Phone. Two contacts are listed: "Mohit Sharma" with email "sharma.mohit@outrightcrm.com" and "Mohit Sharma" with email "sharma.mohit@outrightcrm.com". Below the table are buttons for "ASSIGN" and "REMOVE", and a "Group" dropdown set to "--None". The bottom section is the "CASES" module, displaying a table with columns for Case #, Department, Status, Subject, and Created by contact. Two cases are listed: "OTM-18" with Department "Technical Support", Status "New", Subject "Smartphone Issue - Urgent Help Needed!", and Created by contact "Mohit Sharma". Similar to the contacts section, there are "ASSIGN" and "REMOVE" buttons and a "Group" dropdown set to "--None".