



SugarCRM Email2Lead

User Guide

User Guide:-

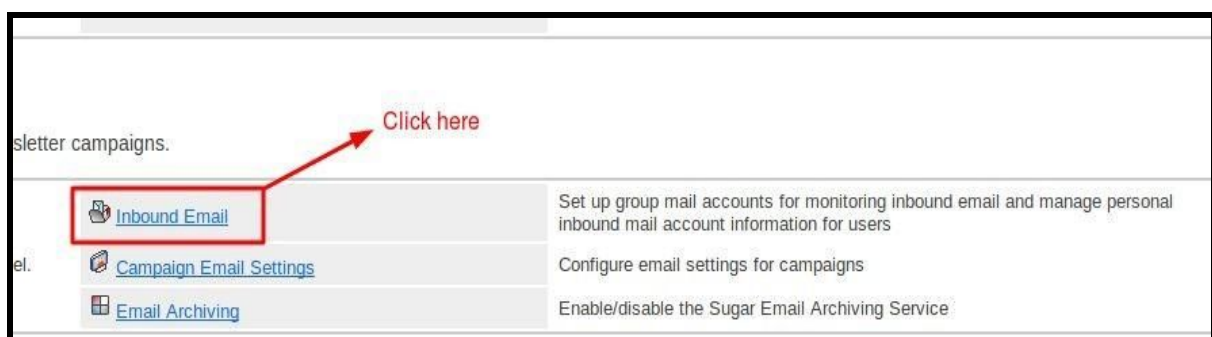
1. Go to the Administration page and click on Record Receiver.



2. Click on "Create Record Receiver" to configure the setting.



3. Select the Group Inbound email for record receiver



4. Select the mapper module to save the record like Lead.

This screenshot shows the configuration form for the Email2Lead module. The 'Mapper Module' dropdown is highlighted with a red box, and an arrow points to it with the text 'Select the target module of email data parsing'. The 'Inbound email' dropdown is also highlighted with a red box, and an arrow points to it with the text 'Select the inbound group: email for record receiver'. The 'Status' is set to 'Active'.

5. Select the fields for mapping and create the "Aliases" for the fields.

This screenshot shows the field mapping section of the configuration form. The 'Mapper Module' is set to 'Leads'. The 'first_name' and 'last_name' fields are selected for mapping, and their respective aliases 'FirstName' and 'LastName' are entered. An arrow points to the 'first_name' field with the text 'Select the field name and set the alias/token of email'. The 'Body Email' checkbox is unchecked.

6. Checked the body email checkbox if you want to create the lead from body email address and set the alias for the email address.

This screenshot shows the 'Body Email' section of the configuration form. The 'Body Email' checkbox is checked, and an arrow points to it with the text 'Checked the body email for body email receiver and set the token for email address'. The 'Body Email Mapper' dropdown is highlighted with a red box. The 'Assigned to' field is also visible.

Note: If you are checking Body email mapper then must use the mapper because it is the mandatory Field.

7. Setup the assignment rule for the newly created record.

Mapper Module: *

Body Email

Body Email: ☐ Set the assignment rule of newly created record Body Email Mapper:

Assignment Rule

Unassigned: ☐ Assigned to:

Auto Assign: ☐

8. Setup the notification rule for the newly created record.

Assignment Rule

Unassigned: ☐ Checked for admin notify

Auto Assign: ☐

Notification Rule

Admin: ☐

Assigned to:

Notify to any add-on email address

Email Address:

9. Click on save after configuring all settings.

Save Cancel Click Here

Name: * Test inbound email: * ashish.negi@outrightcrm.com

Status: Active

Mapper Module: * Leads

Lead Source Field: *

first_name First Name

last_name Last Name

description Description

phone_mobile Mobile

Body Email

Body Email: ☒ Body Email Mapper: Email

Assignment Rule

Unassigned: ☒ Assigned to:

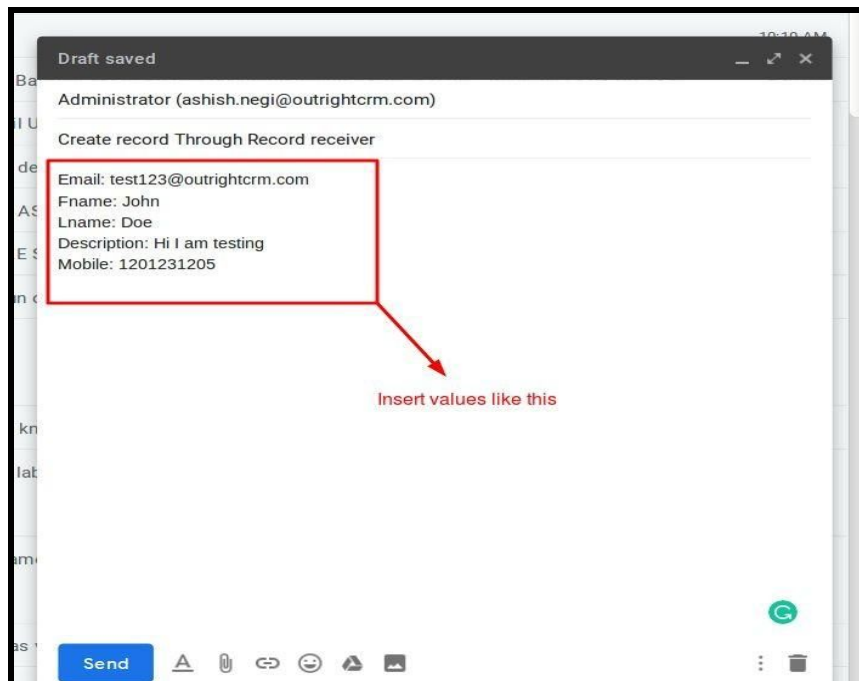
Auto Assign: ☐

Notification Rule

Admin: ☒ Email Address: Test@outrightcrm.com

Save Cancel

10. Go to email and send the mail to the setup inbound email with all mapped fields.



11. Go to Scheduler and check the "Check Inbound Mailboxes" job, the Scheduler must be working for this functionality.

Check Inbound Mailboxes		
Edit		
Job Name:	Check Inbound Mailboxes	Status: Active
Date & Time Start:	01/01/2005 07:15am	Active From: Always
Date & Time End:	12/31/2020 11:59pm	Active To: Always
Last Successful Run:	04/26/2019 07:29am	Interval: As often as possible.
Execute If Missed:		Job: function: pollMonitoredInboxes
Date Created:	04/24/2019 01:33pm by Administrator	Date Modified: 04/24/2019 01:33pm by Administrator
Job Log		
Job Name		
Job Status		Execute Time
Check Inbound Mailboxes	done	04/26/2019 07:29am
Check Inbound Mailboxes	done	04/26/2019 07:28am
Check Inbound Mailboxes	done	04/26/2019 07:26am
Check Inbound Mailboxes	done	04/26/2019 07:23am
Check Inbound Mailboxes	done	04/26/2019 07:22am

12. Go to selected mapper module and observe that the new record will create with all information.

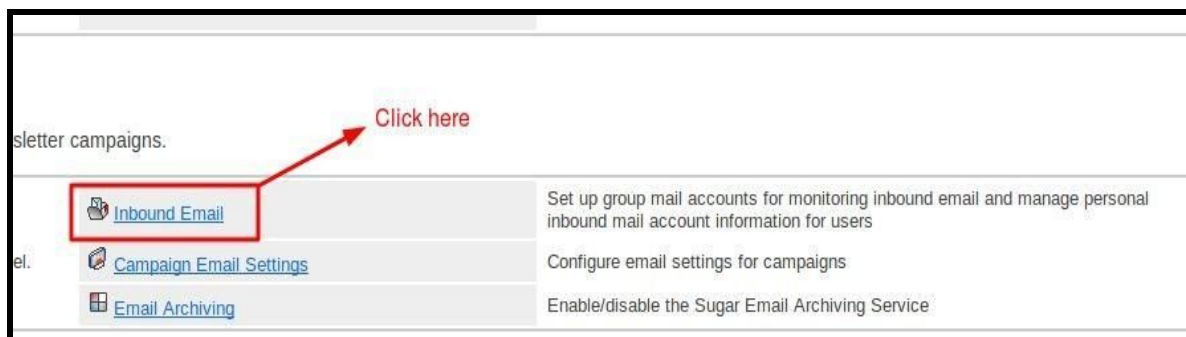
The screenshot displays a lead record in SugarCRM. At the top, there is a header bar with a blue 'Le' icon, the name 'John Doe', a star icon, and two buttons: 'Following' (highlighted in dark grey) and 'Unconverted' (white with a grey border). Below the header, the lead information is organized into two columns. The left column contains fields: Title, Website, Account Name, Tags, Primary Address, Department, Campaign, Twitter Account, Description (with the value 'Hi I am testing'), Status (with the value 'New'), Lead Source, and Assigned to (with the value 'Administrator'). The right column contains fields: Mobile (with the value '1201231205'), Do Not Call (with an unchecked checkbox), Email (with the value 'test123@outrightcrm.com'), Alternate Address, Office Phone, Fax, D&B Principal Id, Status Description, Lead Source Description, and Opportunity Amount.

Field	Value
Title	
Mobile	1201231205
Website	
Do Not Call	<input type="checkbox"/>
Account Name	
Email	test123@outrightcrm.com
Tags	
Primary Address	
Alternate Address	
Department	
Office Phone	
Campaign	
Fax	
Twitter Account	
D&B Principal Id	
Description	Hi I am testing
Status	New
Status Description	
Lead Source	
Lead Source Description	
Assigned to	Administrator
Opportunity Amount	

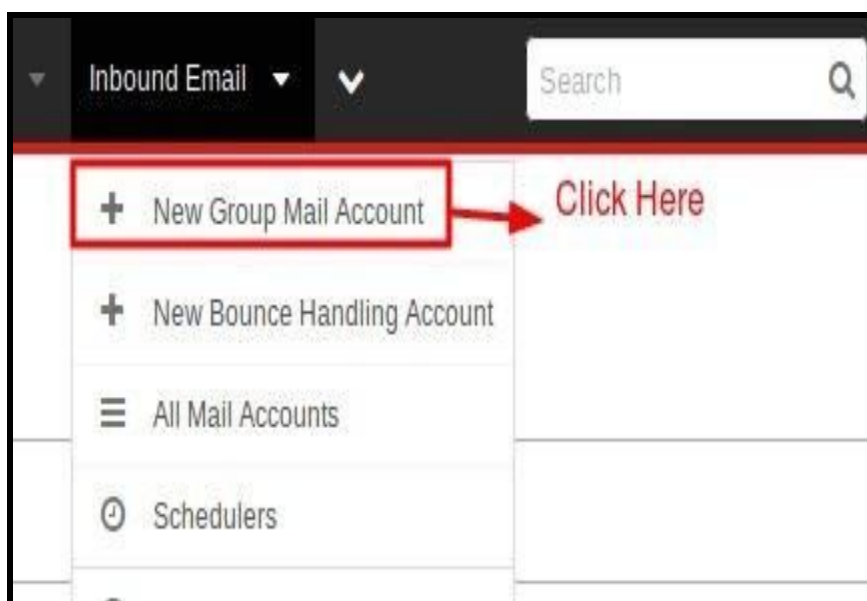
NOTE: If you are using a free plugin and it works for you, please share your feedback and suggestions.

Configuration Guide:-

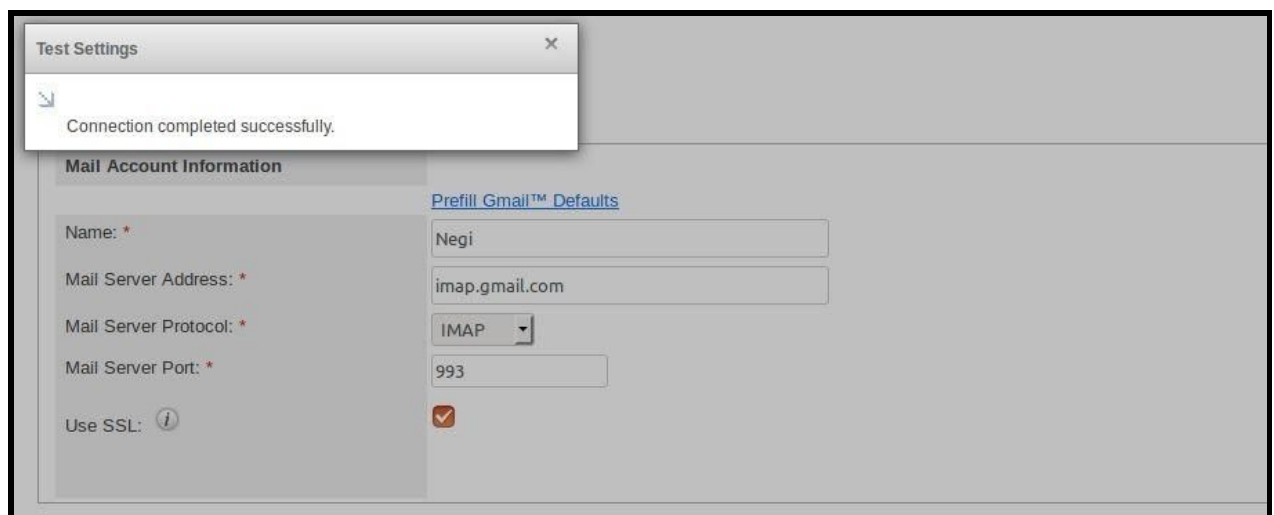
1. Go to the Administration page.
2. Click on the Inbound Email to configure the inbound email address.



3. Click on New Group Email Account, insert the all required information and **checked Import emails Automatically**.



4. Click on "**Test Settings**", observe that "**Connection completed successfully**" should appear on Pop-up.



NOTE: After Installing each plugin, It is mandatory to repair and execute.