



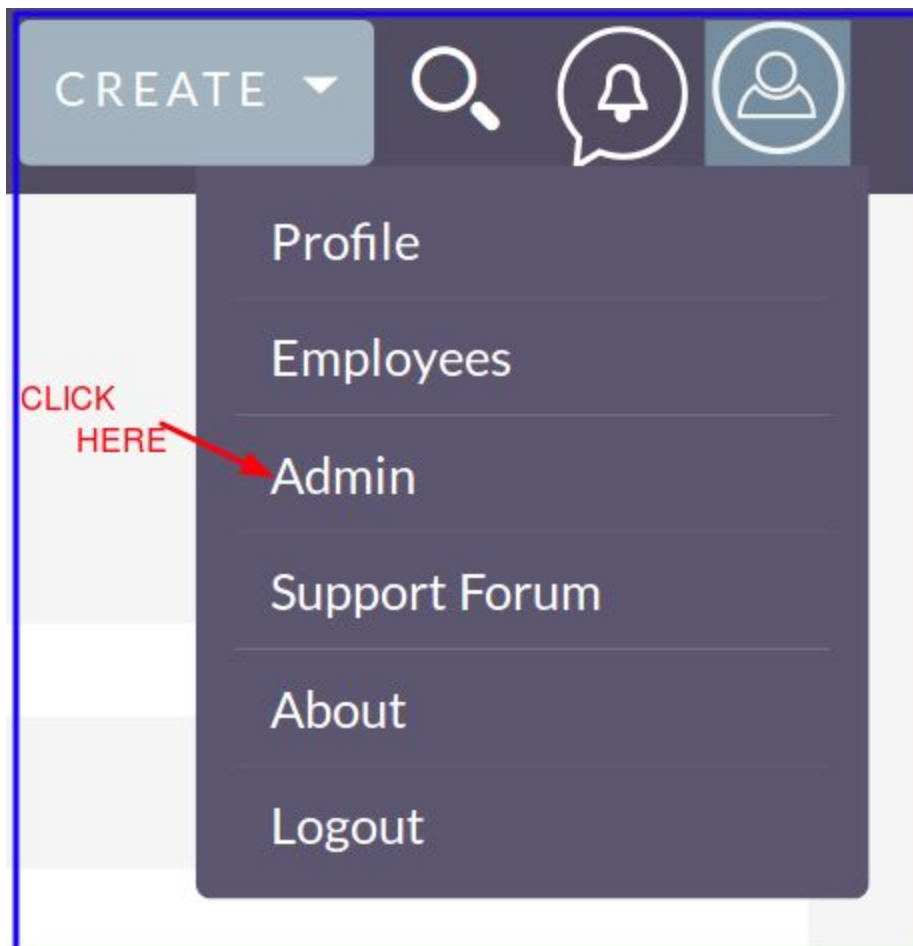
## BCC Archive

### Pre-requisites

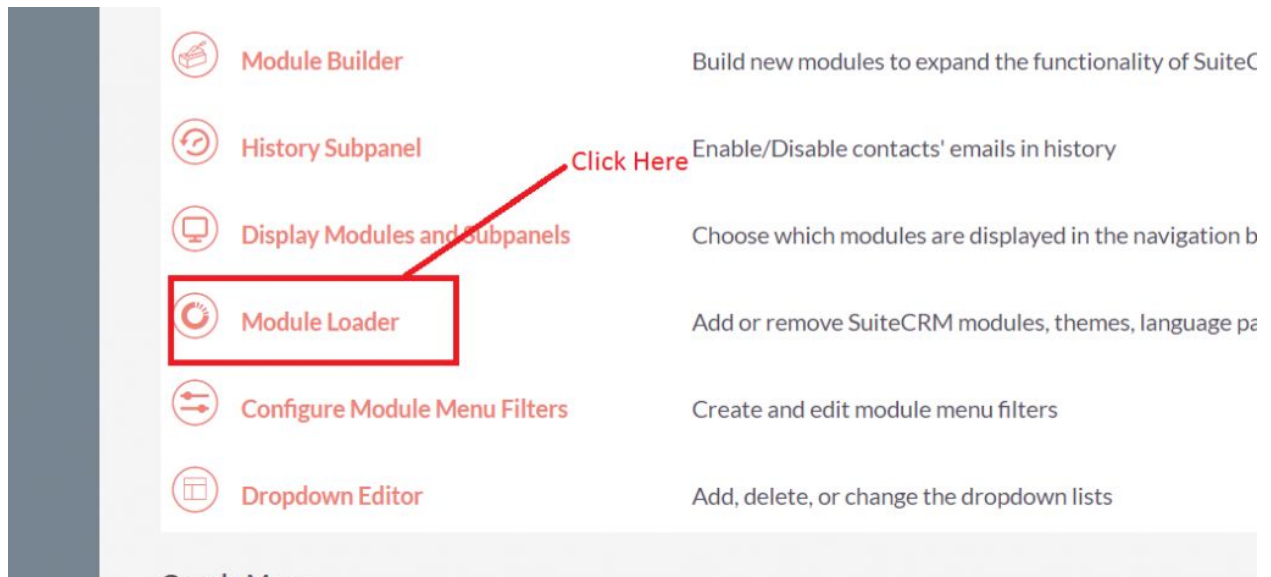
1. Log in as an Administrator.
2. Verify the CRM version should be compatible with BCC Archive.
3. CRM should have the Outright utils file, if not then install the **OutrightUtils** package first then install the Bcc Archive.
4. You must have an Inbound account to configure the BCC Archive.
5. Cron Job must be set up in CRM.

## Installation Guide:-

1. Go to the Administration page.



2. Click on “**Module Loader**” to install the package.



### 3. Click on "Choose File" button and select the BCC Archive.zip

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

## MODULE LOADER

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version	Date Installed	Description
Outright Utils Core Package	<a href="#">UNINSTALL</a>	<a href="#">DISABLE</a>	module	5.2	12/31/2018 07:02	Installs Outright utils

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Select the BCC Archive.Zip

Click on upload after select the BCC Archive.zip file

Module  No file chosen [UPLOAD](#)

Name	Install	Delete	Type	Version	Date Published	Uninstallable	Description
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4. Click on "**Upload**" to upload the file in CRM and then click on the Install button.

The screenshot displays the 'MODULE LOADER' interface. At the top, it states 'The following extensions are installed on this system:'. Below this is a table of installed modules:

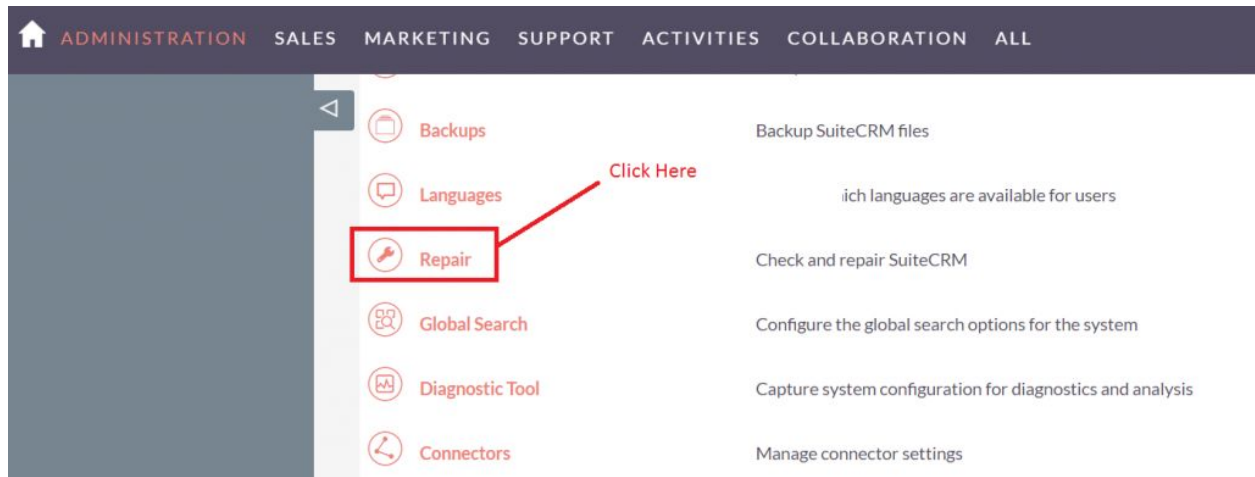
Name	Action	Enable/Disable	Type	Version	Date Installed	Description
Outright Utils Core Package	UNINSTALL	DISABLE	module	5.2	12/31/2018 07:02	Installs Outright utils

Below the installed modules table is a green progress bar. Underneath the progress bar is a 'Module' section with a 'Choose File' button (labeled 'No file chosen') and an 'UPLOAD' button. Below this is another table of available modules:

Name	Install	Delete	Type	Version	Date Published	Uninstallable Description
Outright BCC Archive	INSTALL	DELETE PACKAGE	Module	1.8	2018-12-31 12:49:41	Yes Installs Outright BCC

A red arrow points from the text 'Click here to install the BCC Archive Functionality' to the 'INSTALL' button in the second table. The 'INSTALL' button is also highlighted with a red box.

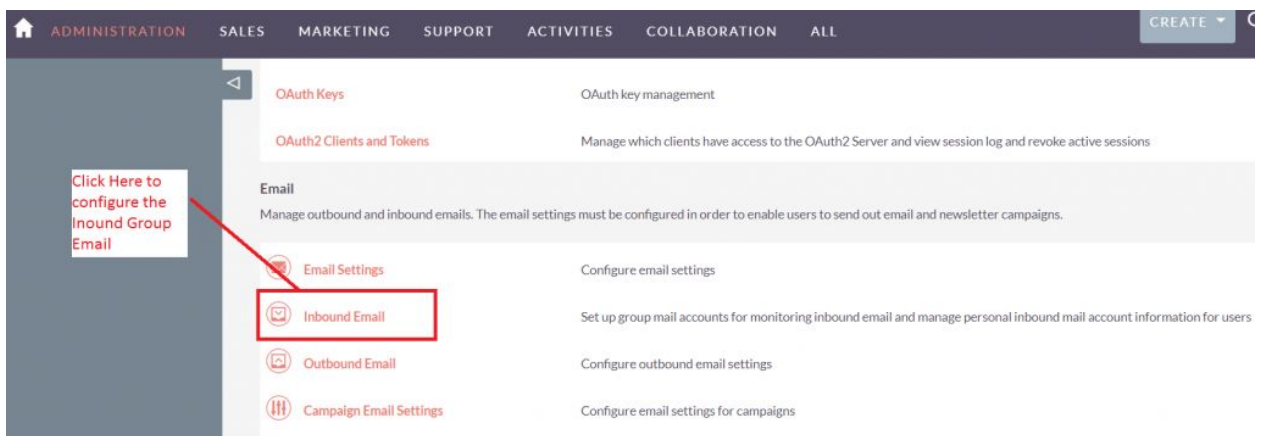
5. Again go to the Administration page and click on repair.



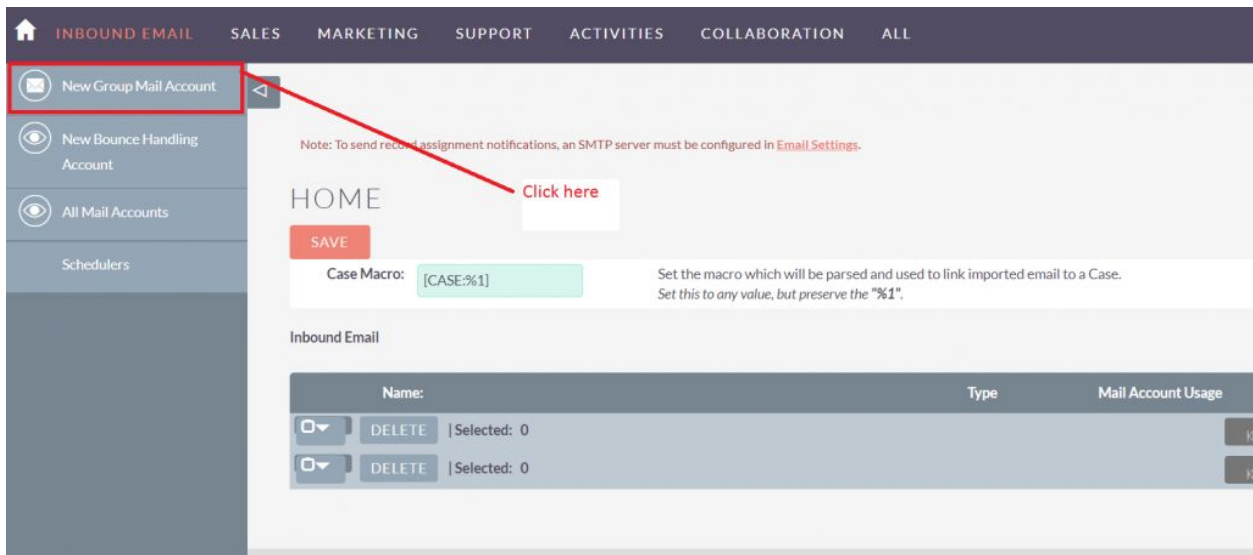
6. Click on "**Quick Repair and Rebuild**" and click on execute button.

## Configuration Guide:-

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

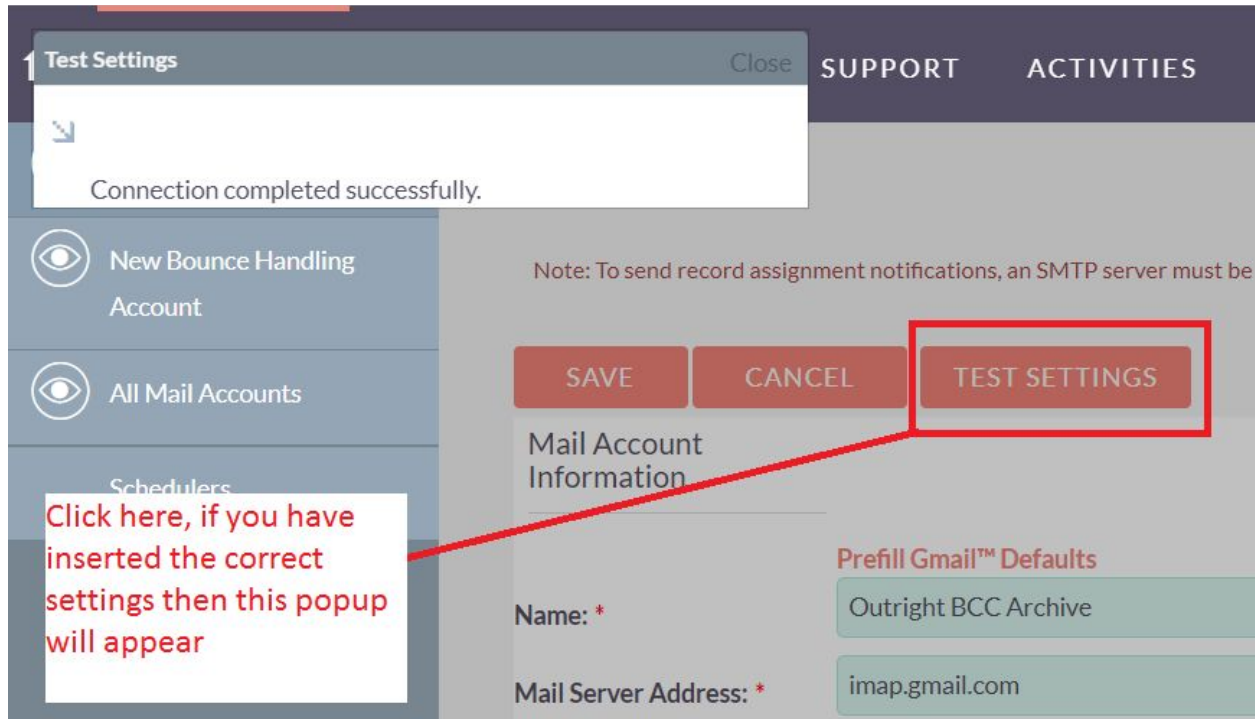


3. Click on New Group Email Account, insert the all required information and **checked Import emails Automatically.**

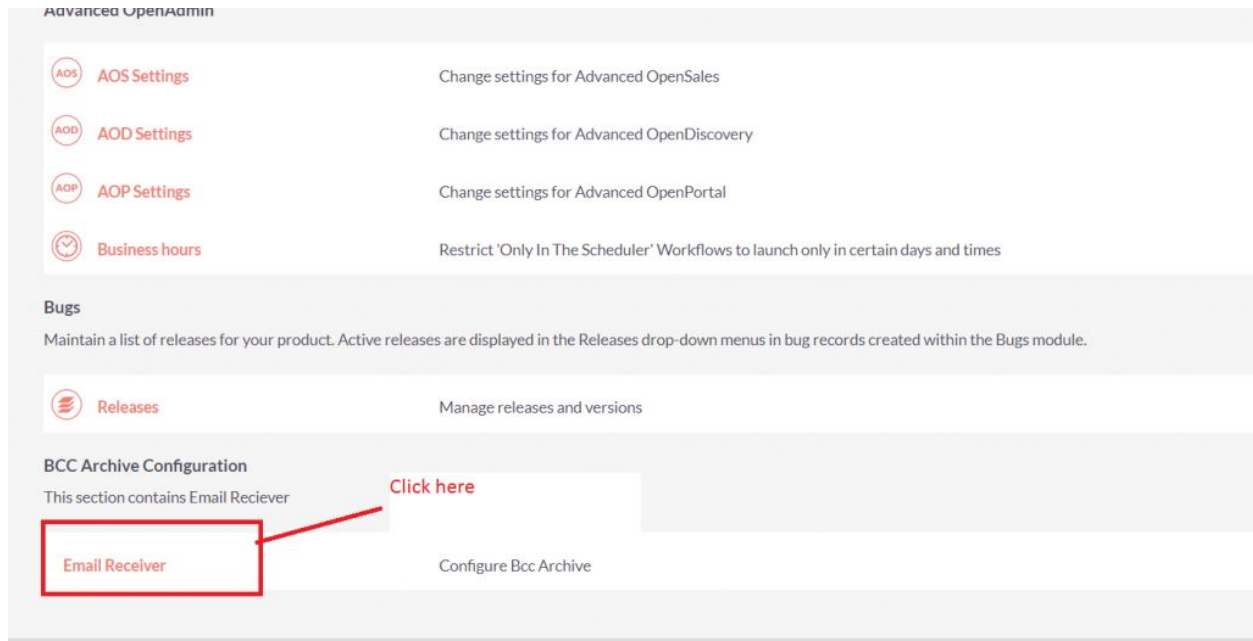




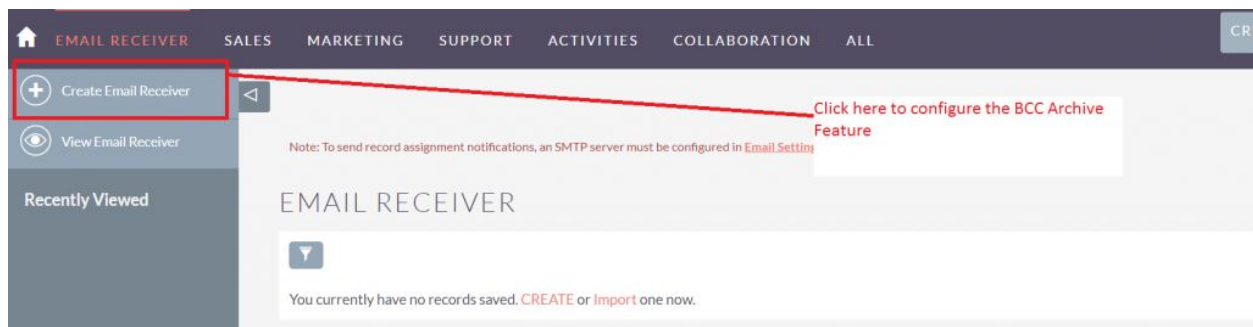
4. Click on "Test Settings", observe that "Connection completed successfully" should appear on Popup.



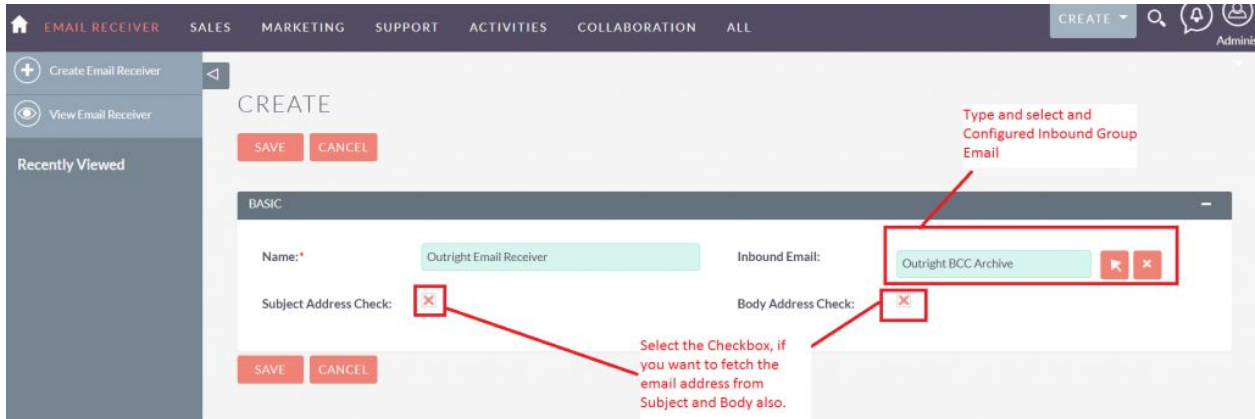
5. Again go to the Administration page and click on Email Receiver.



6. Enter the name of the settings and select the configure Inbound group email.

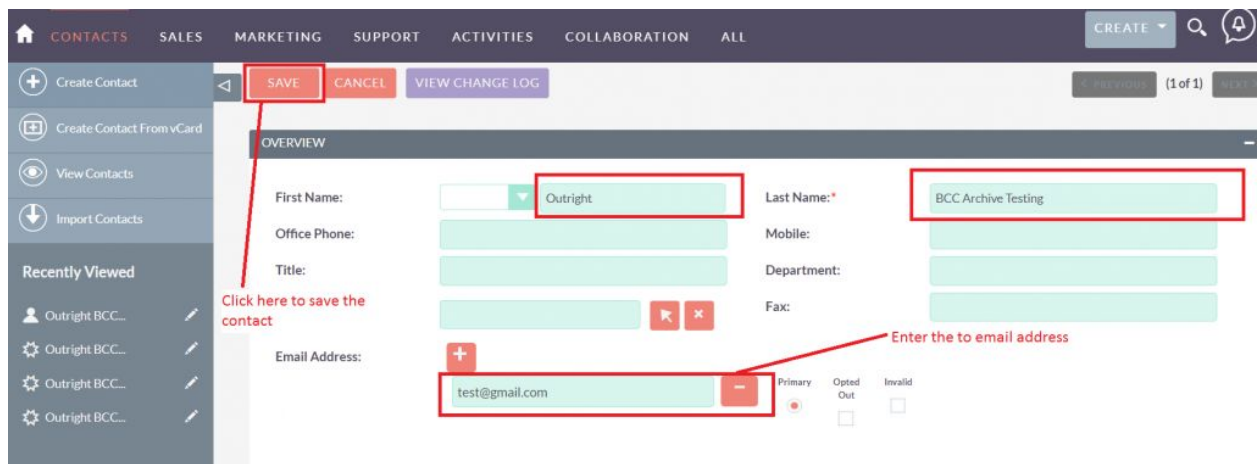


7. Checked the Subject and Body checkbox, if you want to fetch the subject and body email address also.

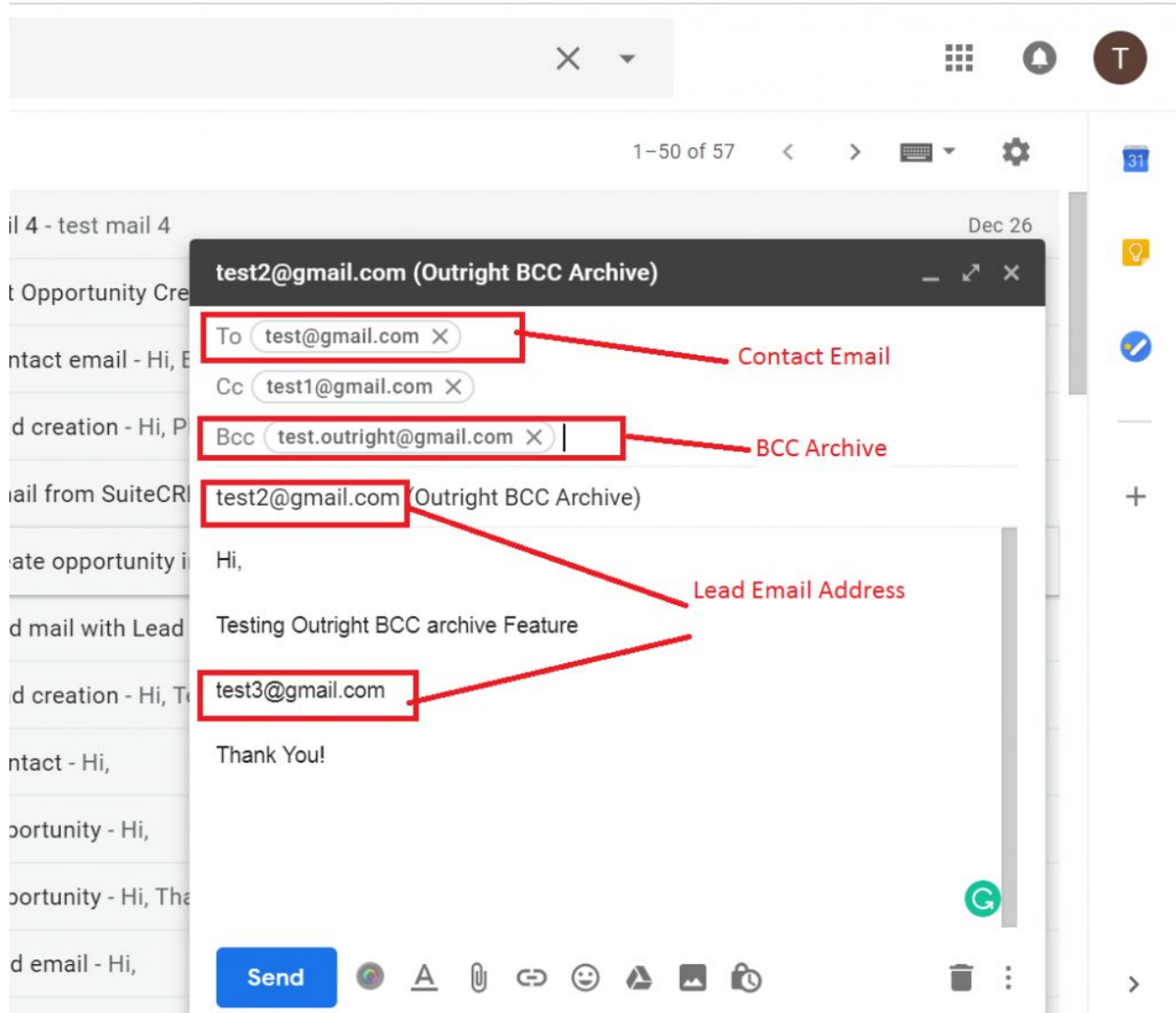


## User Guide:-

1. Go to any module like "Contact".
2. Create a new contact, enter the email address and required field then click on save.

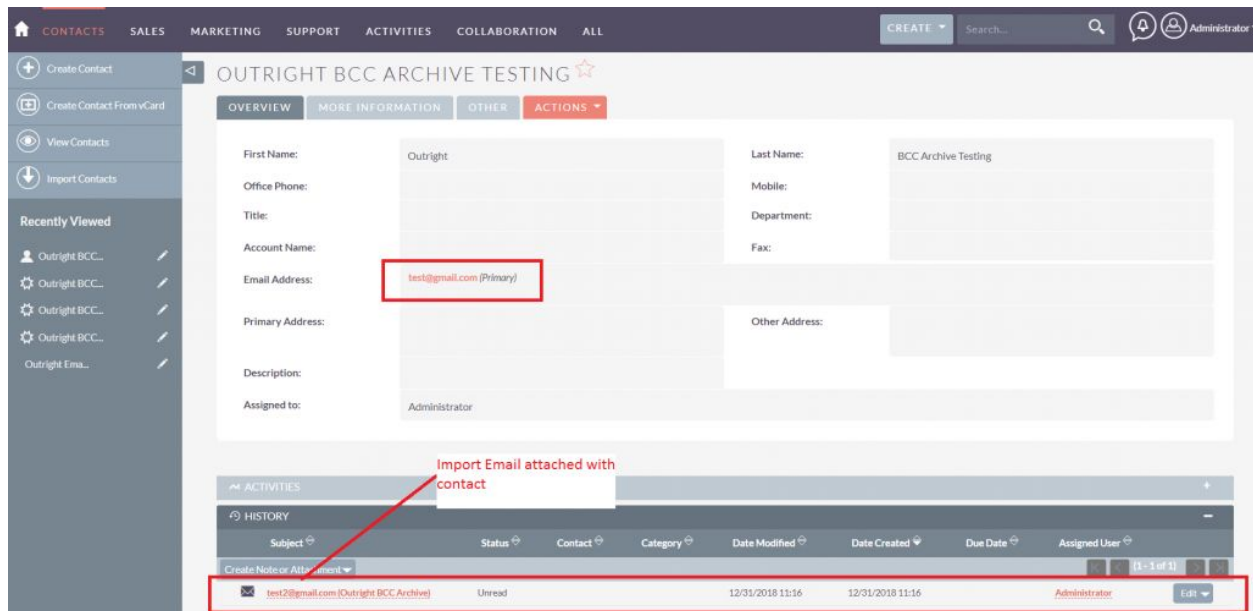


3. Send the email from outside the CRM to the created contact and cc one more email address, enter configure Inbound email address in BCC.



4. Enter the Email address in Subject and Body both, then send the mail.

5. Go to the created Contact and check the history after one minute and observe that the sent mail appears in history subpanel.



6. Create the 3 new records in any other module like "Lead" with the "CC, Subject and Body" email address and observe that the sent mail also appears on both 3 new created records history Subpanel

The screenshot displays the Outright CRM interface for a lead record titled "OUTRIGHT BCC ARCHIVE TEST LEAD 2". The lead details include:

- Name: Outright BCC Archive Test Lead 2
- Title: [Empty]
- Department: [Empty]
- Account Name: [Empty]
- Primary Address: [Empty]
- Email Address: test2@gmail.com (Primary)
- Description: [Empty]
- Assigned to: Administrator
- Office Phone: [Empty]
- Mobile: [Empty]
- Fax: [Empty]
- Website: http://
- Other Address: [Empty]

The "HISTORY" subpanel at the bottom shows a table of activities:

Subject	Status	Contact	Category	Date Modified	Date Created	Due Date	Assigned User
test2@gmail.com (Outright BCC Archive)	Unread			12/31/2018 11:16	12/31/2018 11:16		Administrator

A red box highlights the "test2@gmail.com (Outright BCC Archive)" entry in the history table. A red arrow points from the text "Import email attached with subject email lead" to this entry.

**Note:- Write an email through Gmail/outlook and put that email address in any of (to,cc,bcc) section which you have set up in New group mail Account, then put any email address in (to,cc,body and from) section of email, once email is sent then the whole conversation will get attached in CRM history subpanel.**