

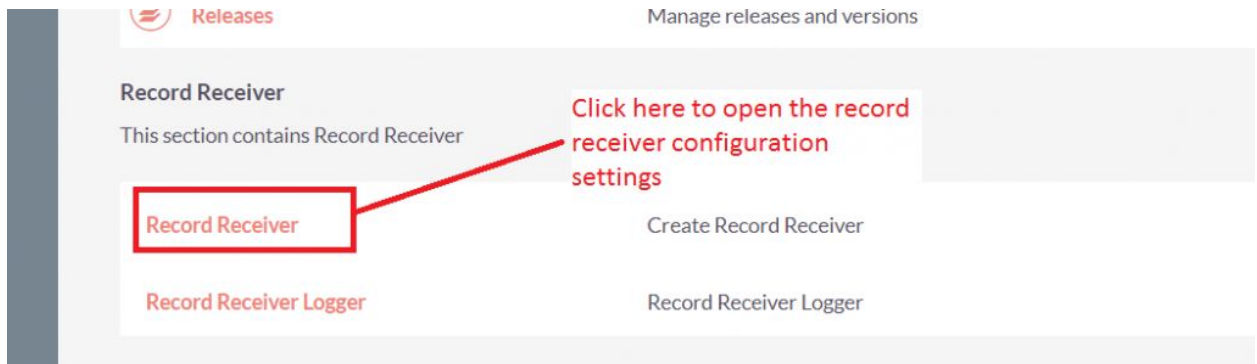


SuiteCRM Email2Lead

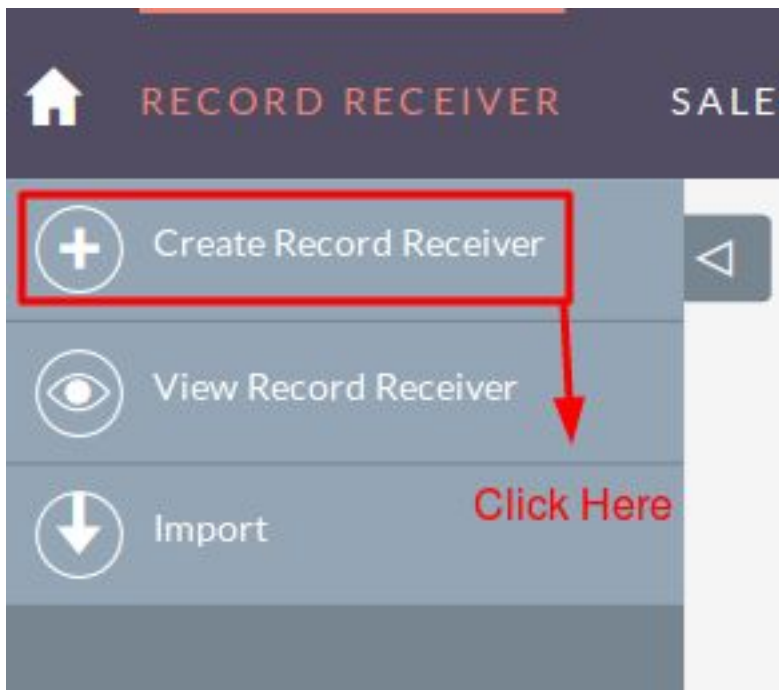
User Guide

User Guide -:

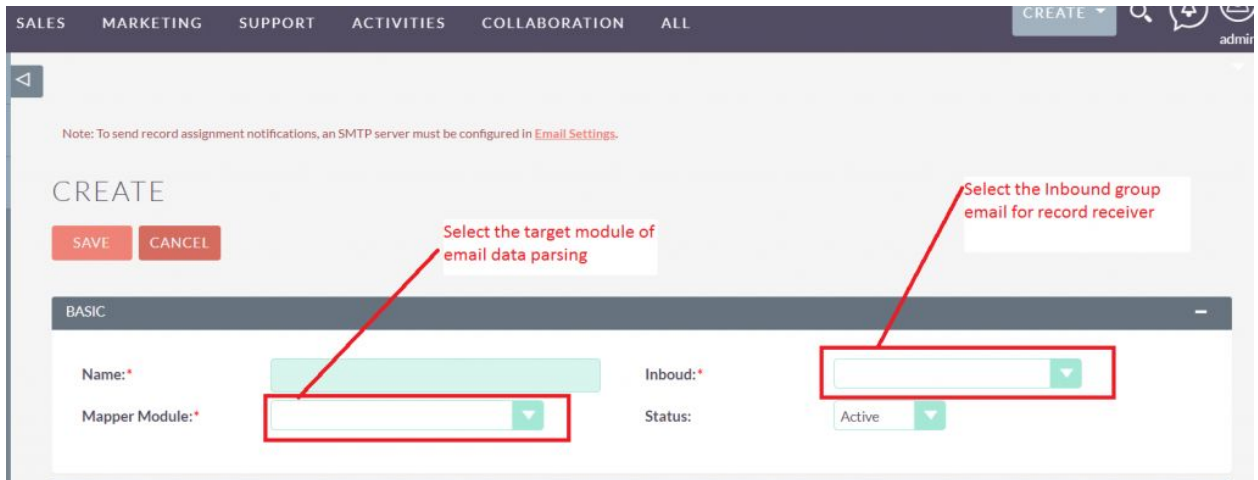
1. Go to the Administration page and click on Record Receiver.



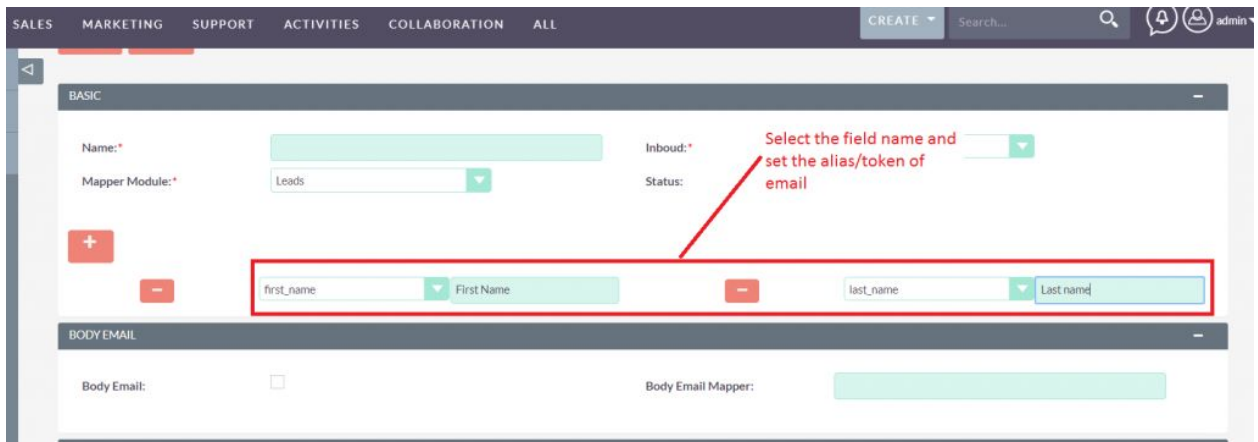
2. Click on "Create Record Receiver" to configure the setting.



- 3. Select the Group Inbound email for record receiver.
- 4. Select the mapper module to save the record like Lead.



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

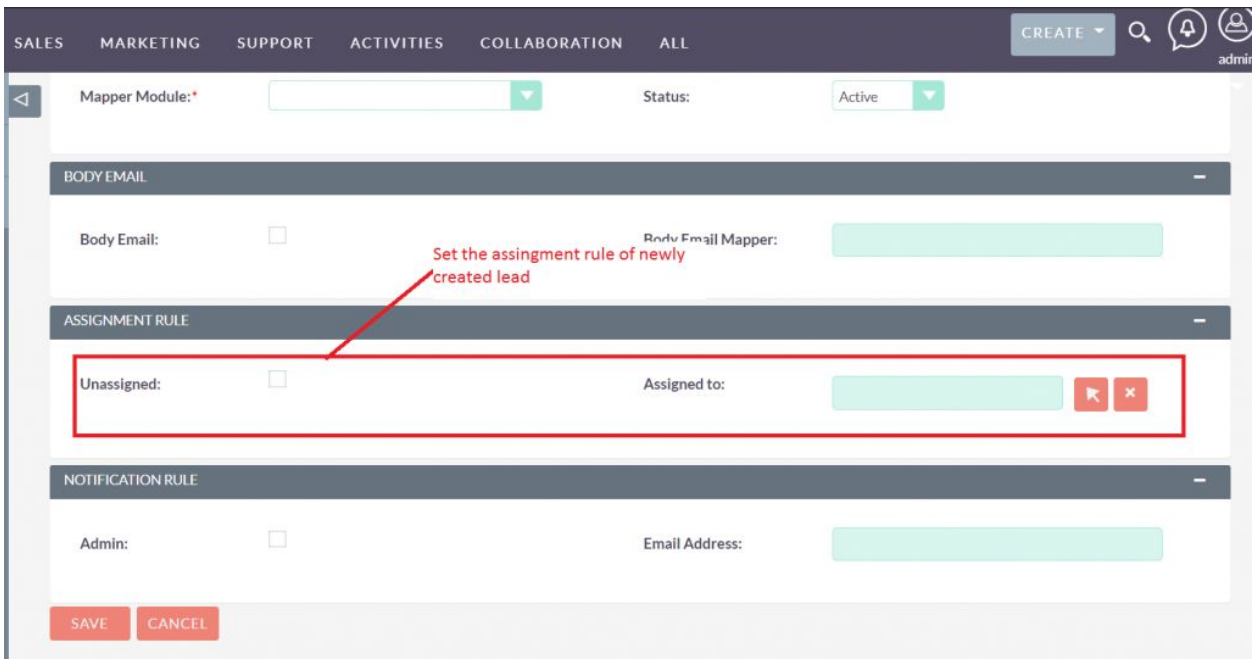


6. Checked the body email checkbox if you want to create the lead from the body email address and set the alias for the email address.



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.



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

ASSIGNMENT RULE

Unassigned: Assigned to: Notify to any add-on email address

Checked for admin notify

Notify to any add-on email address

NOTIFICATION RULE

Admin: Email Address: admin@outrightcrm.com

SAVE CANCEL

9. Click on save after configuring all settings.

SAVE CANCEL Click Here

BASIC

Name: Test Inbound email: ashish.negi@outrightcrm.com

Mapper Module: Leads Status: Active

+ - first_name FName - last_name Lname

- description Description - phone_mobile Mobile

BODY EMAIL

Body Email: Body Email Mapper: Email

ASSIGNMENT RULE

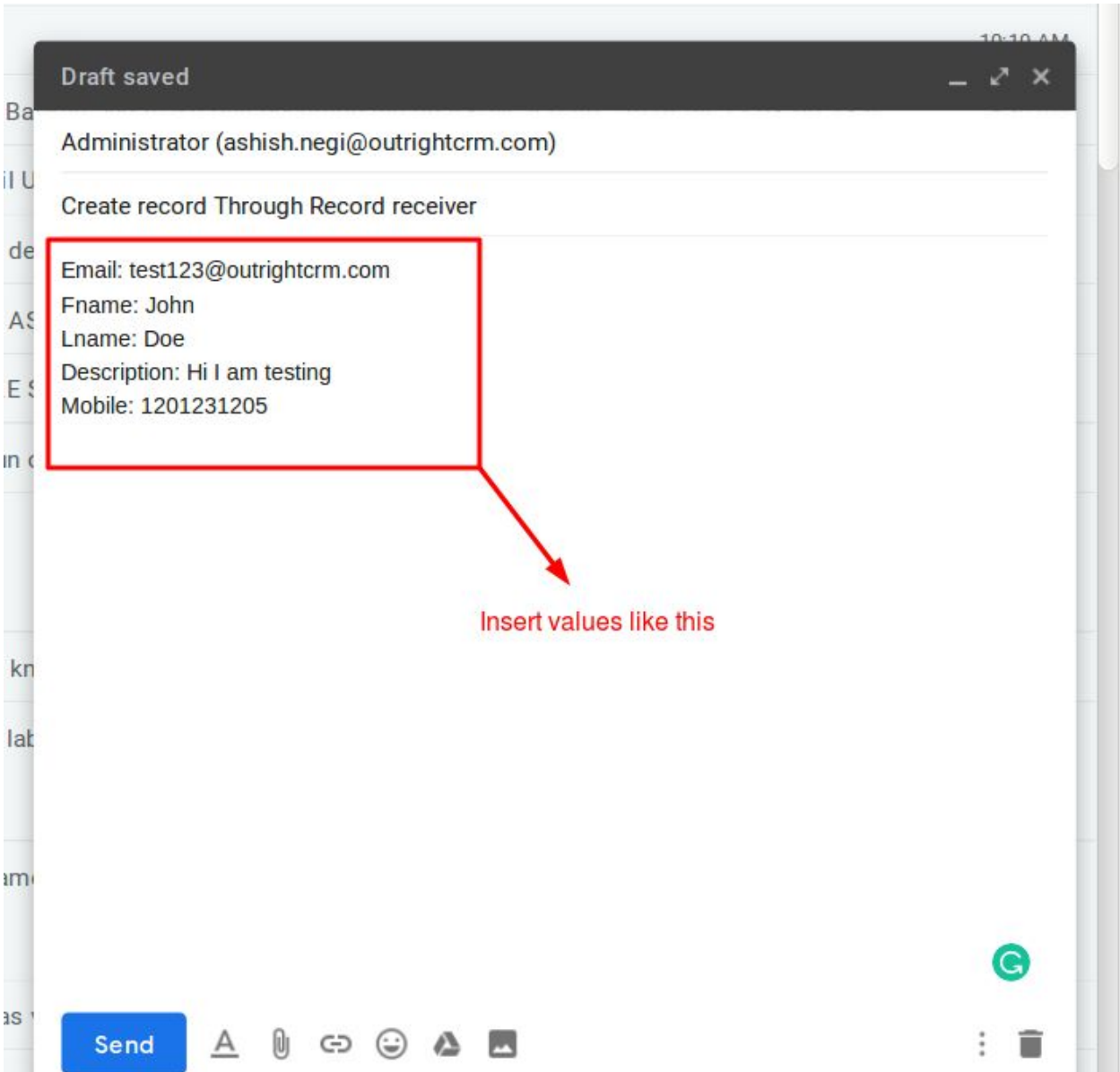
Unassigned: Assigned to:

NOTIFICATION RULE

Admin: Email Address: Test@outrightcrm.com

SAVE CANCEL

10. Go to email and send 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.

The screenshot shows the configuration for a job named "CHECK INBOUND MAILBOXES". The job is active and has been running since 04/12/2019 15:38. The configuration includes fields for Job Name, Date & Time Start, Date & Time End, Last Successful Run, Execute If Missed, Date Created, Status, Active From, Active To, Interval, Job, and Date Modified.

Below the configuration is a "JOB LOG" table showing the execution history:

Job Name	Job Status	Execute Time	Date Modified
Check Inbound Mailboxes	done	04/12/2019 15:38	04/12/2019 15:38
Check Inbound Mailboxes	done	04/12/2019 15:37	04/12/2019 15:37
Check Inbound Mailboxes	done	04/12/2019 15:36	04/12/2019 15:36

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

The screenshot shows a lead record for "JOHN DOE" in a CRM system. The record is displayed in the "OVERVIEW" tab. The lead has been assigned to "admin" and has a description of "Hi I am testing". The email address is "test123@outrightcrm.com (Primary)".

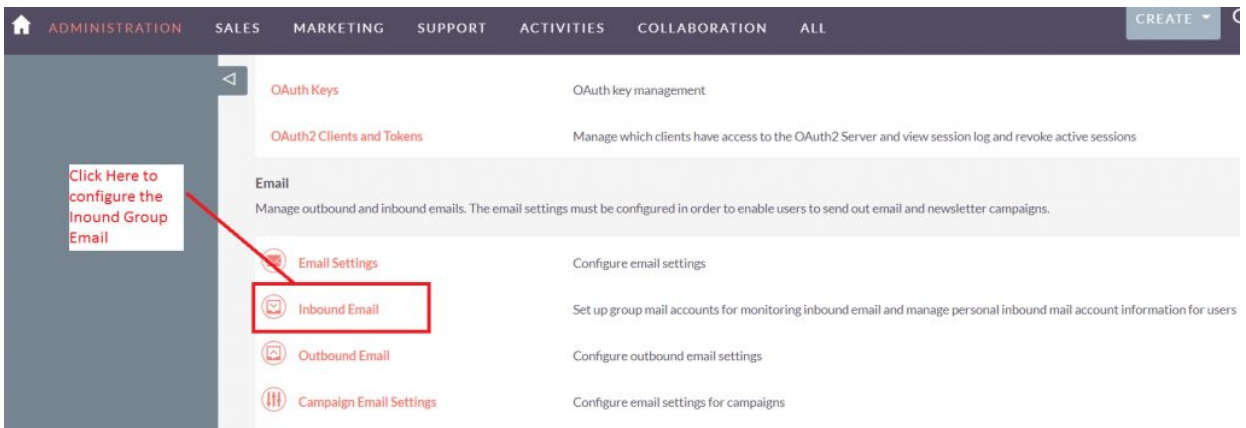
Fields visible in the record include:

- Name: John Doe
- Title:
- Department:
- Account Name:
- Primary Address:
- Email Address: test123@outrightcrm.com (Primary)
- Description: Hi I am testing
- Assigned to: admin
- Office Phone:
- Mobile: 1201231205
- Fax:
- Website: http://
- Other Address:

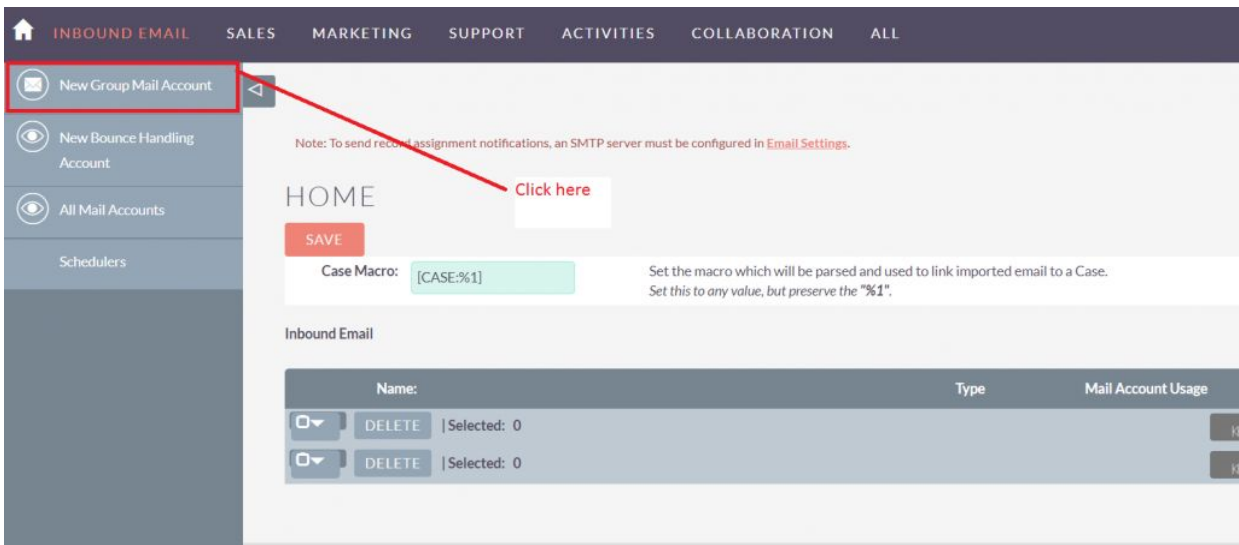
NOTE: If you are using a free plugin and it works for you, please share your feedback and suggestions.

Configuration Guide:-

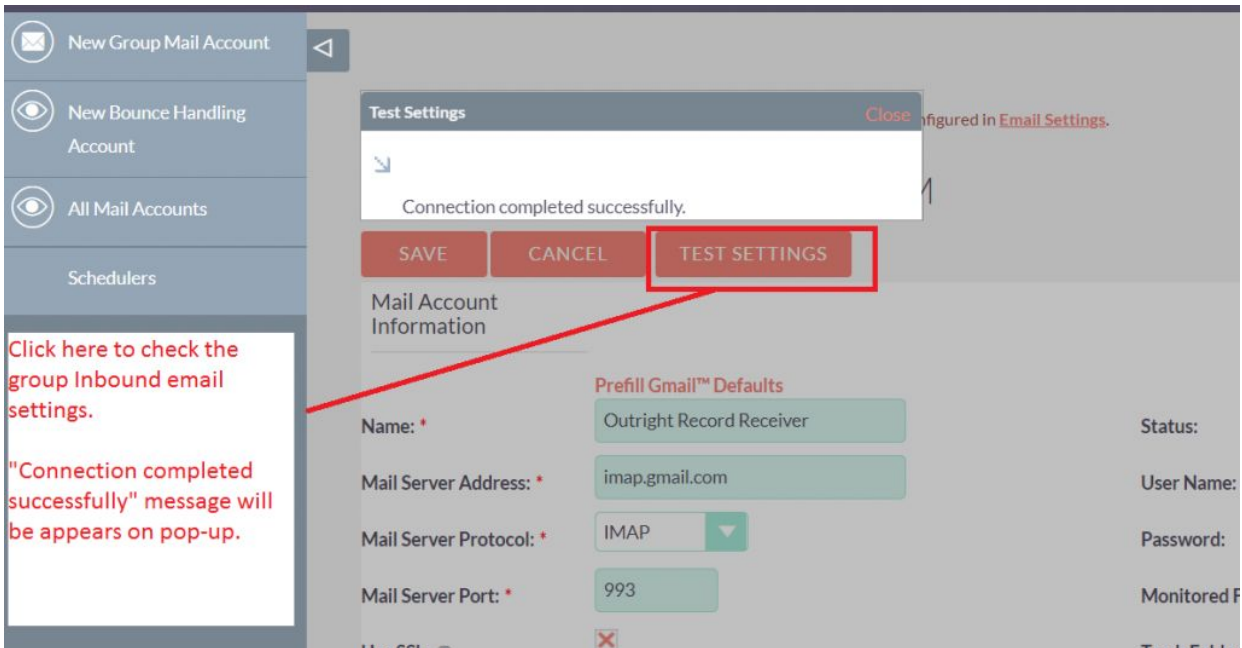
1. Go to the Administration page.
2. Click on the Inbound Email to configure the [Inbound Email](#) address.



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.