



## **SuiteCRM** Record Receiver

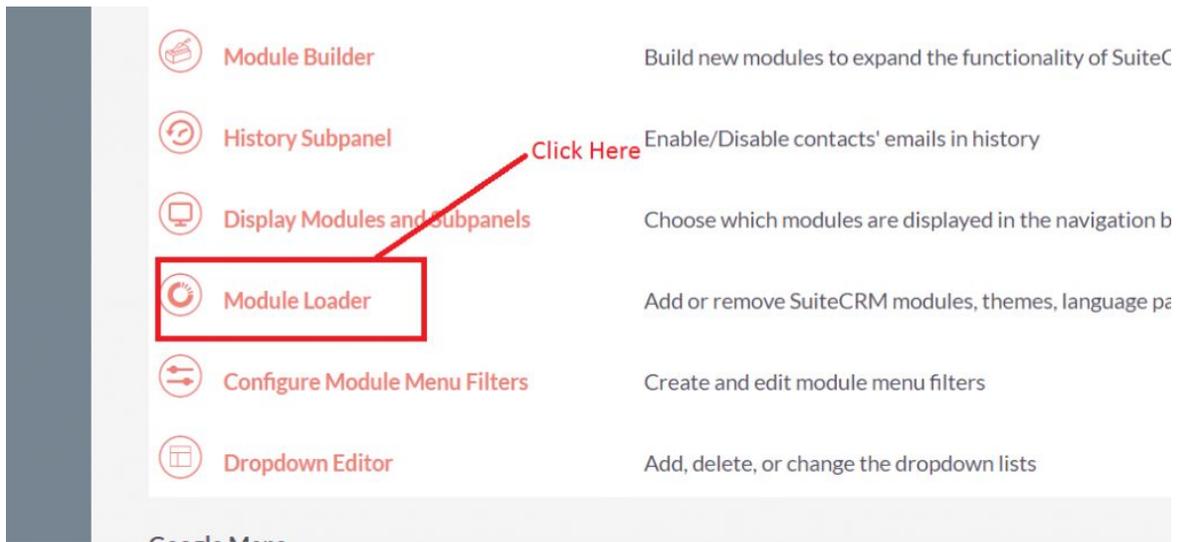
## Pre-requisites

Please follow the below steps before installing the Record Receiver.

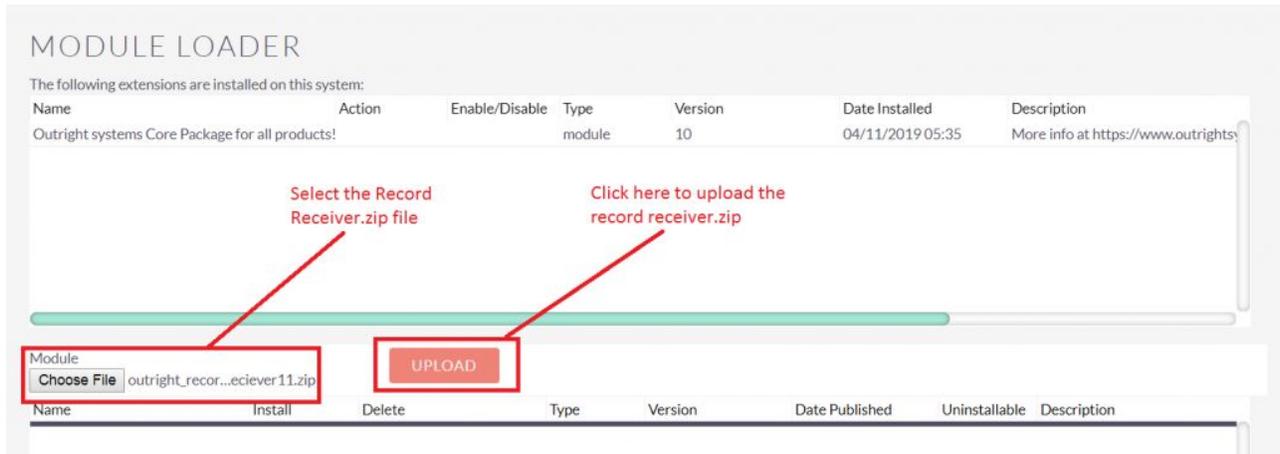
1. Log in as an Administrator.
2. Verify the CRM version should be compatible with Record Receiver.
3. CRM should have the Outright utils version 10, if not then install the OutrightUtils package first then install the Record Receiver.
4. You must have a Group Inbound account to configure the Record Receiver.
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 Record Receiver.zip.



4. Click on **"Upload"** to upload the file in CRM and then click on the Install button.

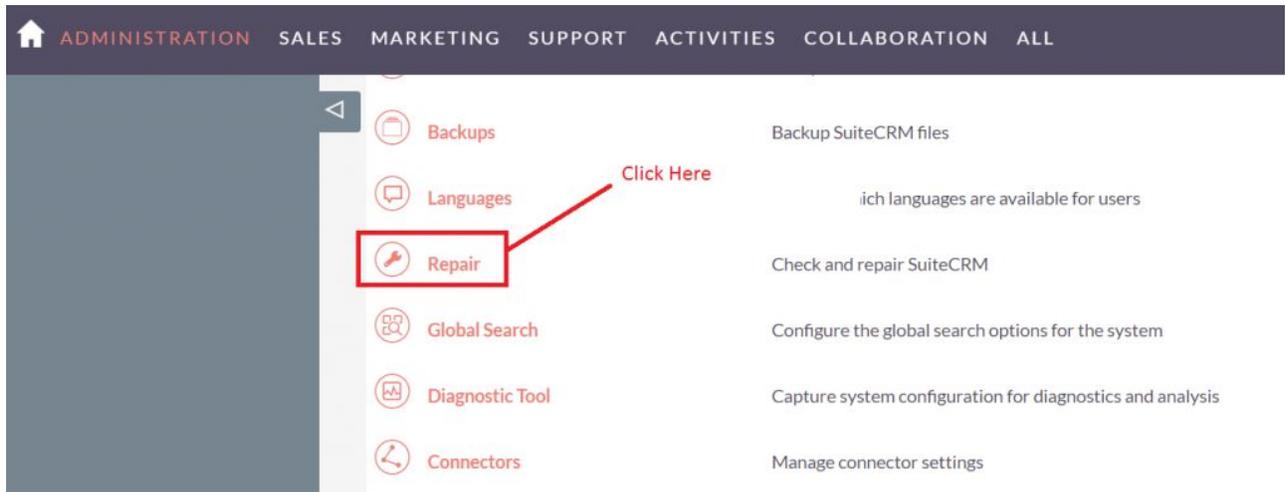
The screenshot displays the 'MODULE LOADER' interface. At the top, it states 'The following extensions are installed on this system:' and lists 'Outright systems Core Package for all products!' with details like 'Type: module', 'Version: 10', and 'Date Installed: 04/11/2019 05:35'. Below this is a horizontal progress bar. Underneath the progress bar, there is a 'Module' section with a 'Choose File' button and an 'UPLOAD' button. A table below shows the 'Outright\_Record\_Reciever' module with columns for Name, Action, Type, Version, Date Published, Uninstallable, and Description. The 'Action' column for this module contains 'Install' and 'DELETE PACKAGE' buttons. A red box highlights the 'INSTALL' button, and a red arrow points to it from the text 'Click here to install the Record Receiver Functionality'.

Name	Action	Enable/Disable	Type	Version	Date Installed	Description
Outright systems Core Package for all products!			module	10	04/11/2019 05:35	More info at https://www.outrights...

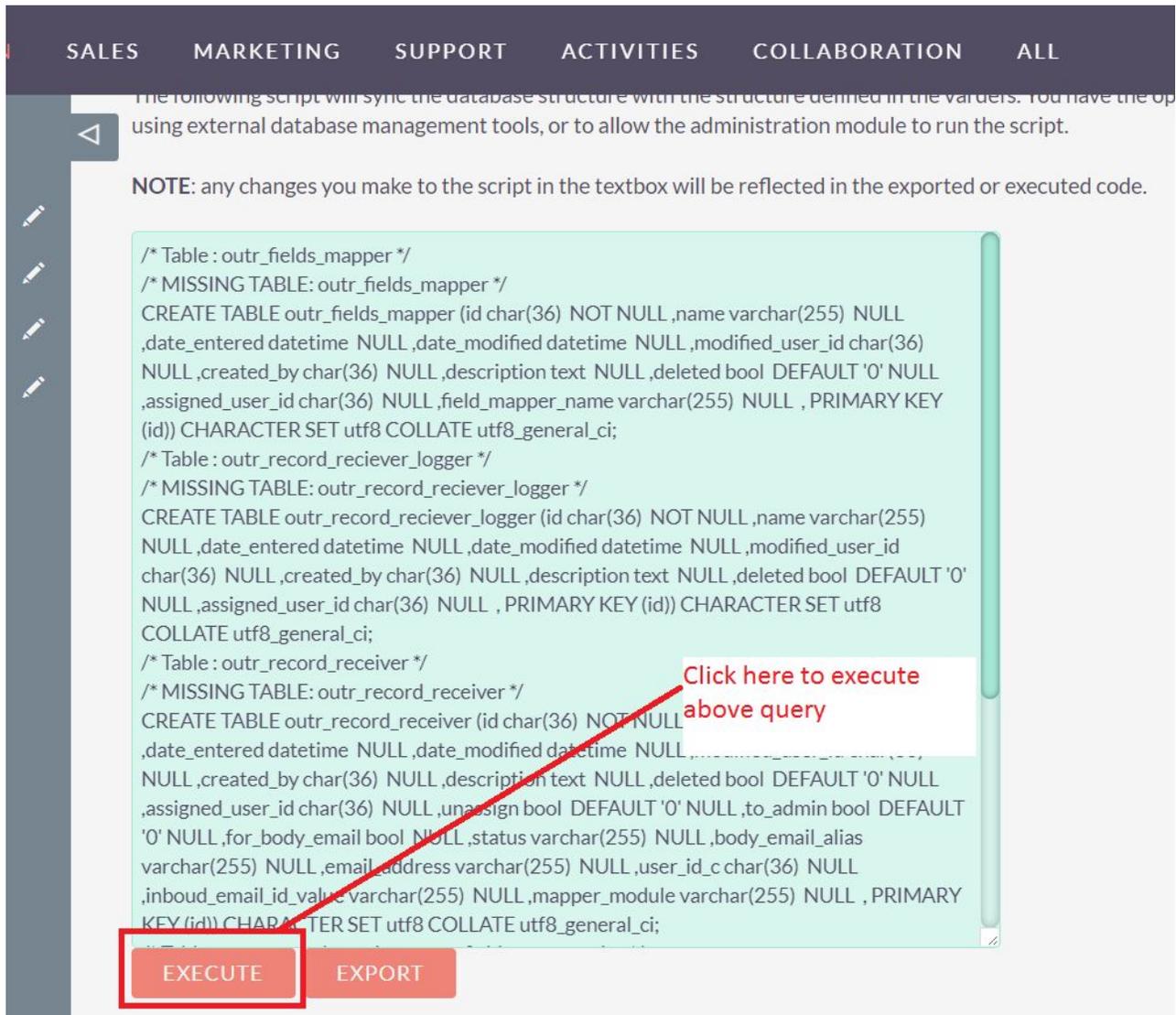
  

Name	Action	Type	Version	Date Published	Uninstallable	Description
Outright_Record_Reciever	INSTALL DELETE PACKAGE	Module	11	2019-01-10 16:25:50	Yes	Installs outright Record Reciev...

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



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



The screenshot shows the SuiteCRM interface with a dark navigation bar at the top containing the following tabs: SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. Below the navigation bar, there is a text area containing the following text:

The following script will sync the database structure with the structure defined in the variables. You have the option to use external database management tools, or to allow the administration module to run the script.

**NOTE:** any changes you make to the script in the textbox will be reflected in the exported or executed code.

The main content is a large text area with a light green background containing SQL code for creating three tables: `outr_fields_mapper`, `outr_record_reciever_logger`, and `outr_record_receiver`. The code includes comments like `/* Table: outr_fields_mapper */` and `/* MISSING TABLE: outr_fields_mapper */`, followed by `CREATE TABLE` statements with column definitions and constraints. The `EXECUTE` button at the bottom left of the text area is highlighted with a red box. A red arrow points from the `EXECUTE` button to a white callout box with red text that says "Click here to execute above query".

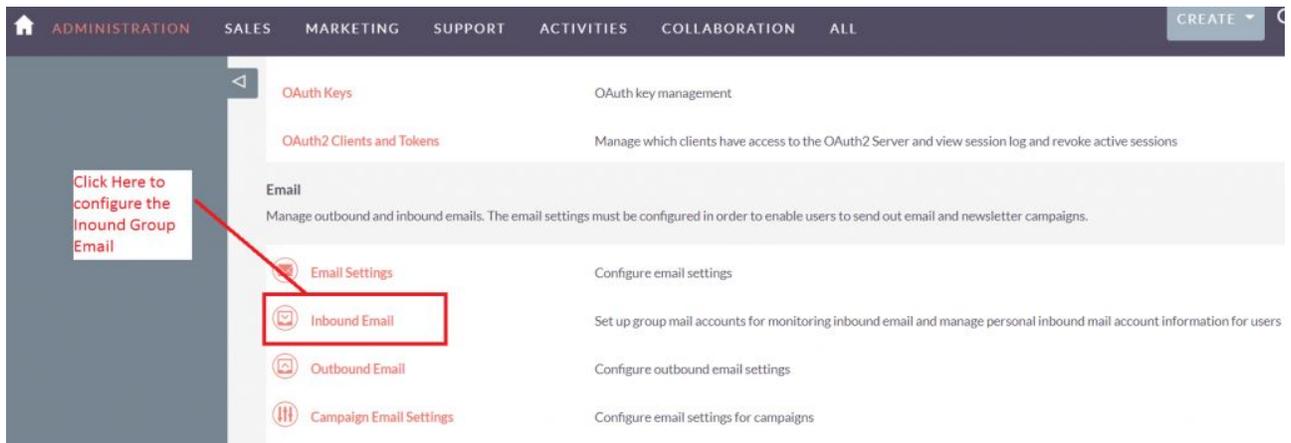
```
/* Table: outr_fields_mapper */
/* MISSING TABLE: outr_fields_mapper */
CREATE TABLE outr_fields_mapper (id char(36) NOT NULL ,name varchar(255) NULL
,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id char(36)
NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0' NULL
,assigned_user_id char(36) NULL ,field_mapper_name varchar(255) NULL , PRIMARY KEY
(id)) CHARACTER SET utf8 COLLATE utf8_general_ci;
/* Table: outr_record_reciever_logger */
/* MISSING TABLE: outr_record_reciever_logger */
CREATE TABLE outr_record_reciever_logger (id char(36) NOT NULL ,name varchar(255)
NULL ,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id
char(36) NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0'
NULL ,assigned_user_id char(36) NULL , PRIMARY KEY (id)) CHARACTER SET utf8
COLLATE utf8_general_ci;
/* Table: outr_record_receiver */
/* MISSING TABLE: outr_record_receiver */
CREATE TABLE outr_record_receiver (id char(36) NOT NULL ,date_entered datetime NULL ,date_modified datetime NULL
NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0' NULL
,assigned_user_id char(36) NULL ,unassign bool DEFAULT '0' NULL ,to_admin bool DEFAULT
'0' NULL ,for_body_email bool NULL ,status varchar(255) NULL ,body_email_alias
varchar(255) NULL ,email_address varchar(255) NULL ,user_id_c char(36) NULL
,inbound_email_id_value varchar(255) NULL ,mapper_module varchar(255) NULL , PRIMARY
KEY (id)) CHARACTER SET utf8 COLLATE utf8_general_ci;
```

EXECUTE EXPORT

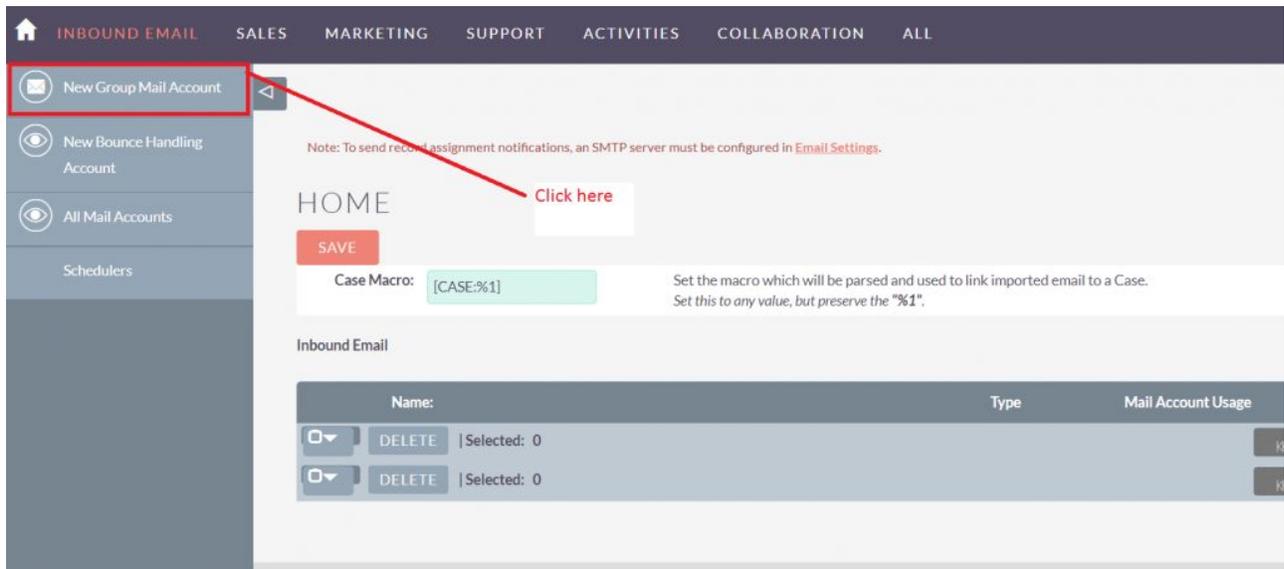
**NOTE:** after installing each plugin, It is mandatory to repair and execute.

## Configuration Guide:-

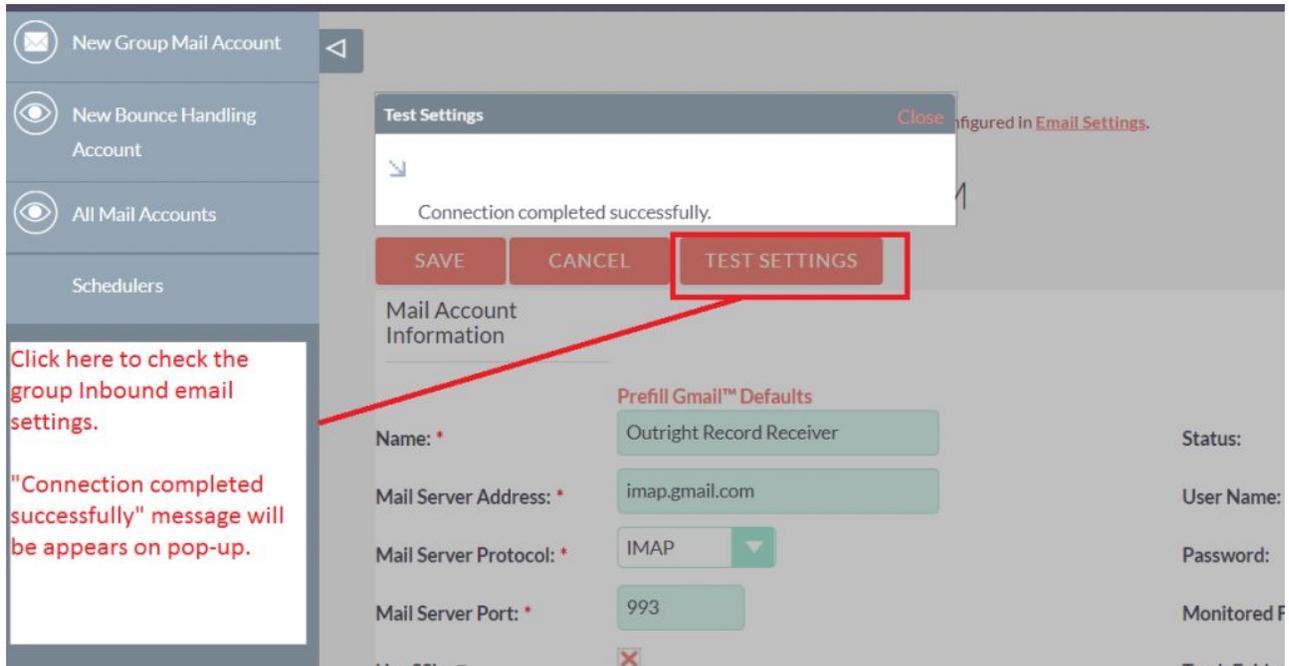
1. Go to the Administration page.
2. Click on the Inbound Email to configure the inbound email address.



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



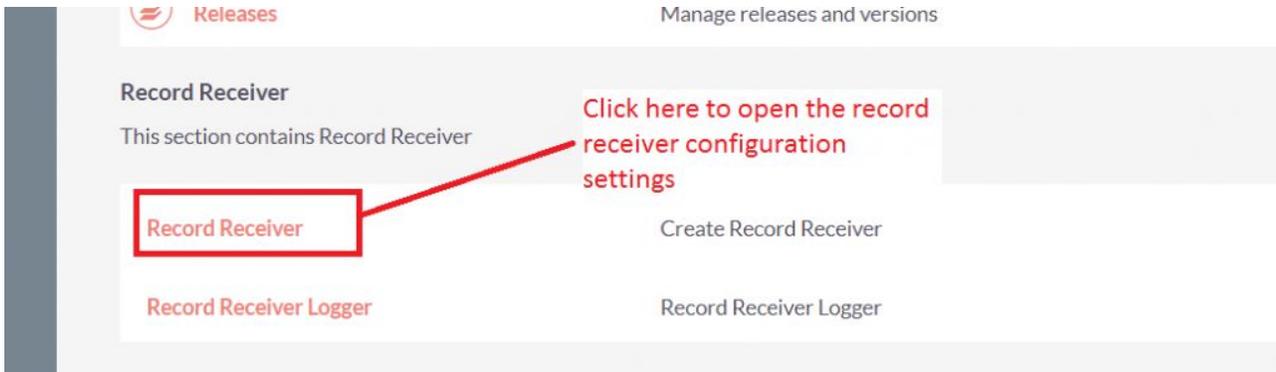
4. Click on **"Test Settings"**, observe that **"Connection completed successfully"** should appear on Pop-up.



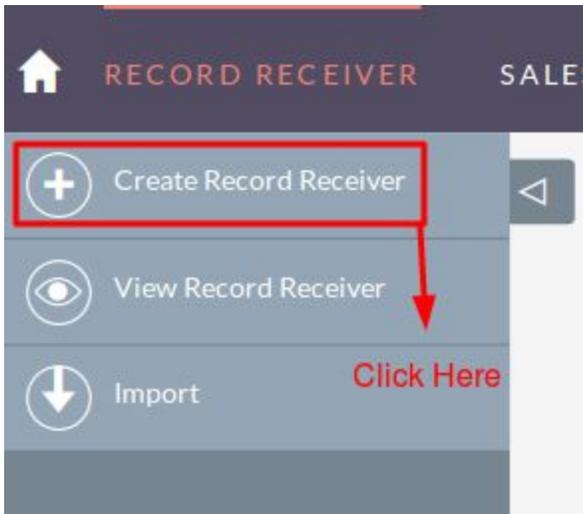
**NOTE:** after installing each plugin, It is mandatory to repair and execute.

## User Guide:-

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

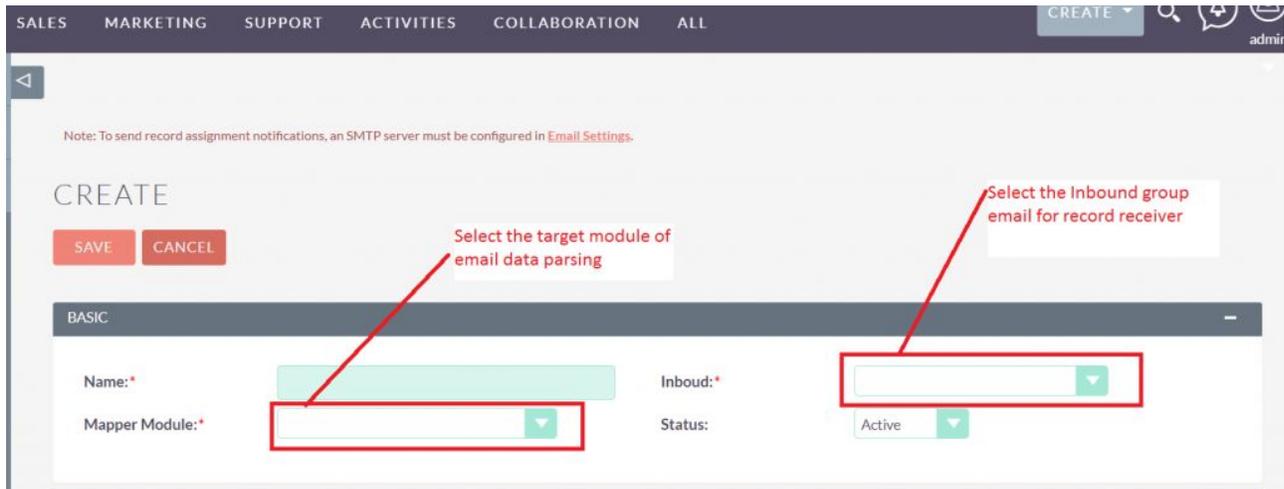


2. Click on "Create Record Receiver" to configure the setting

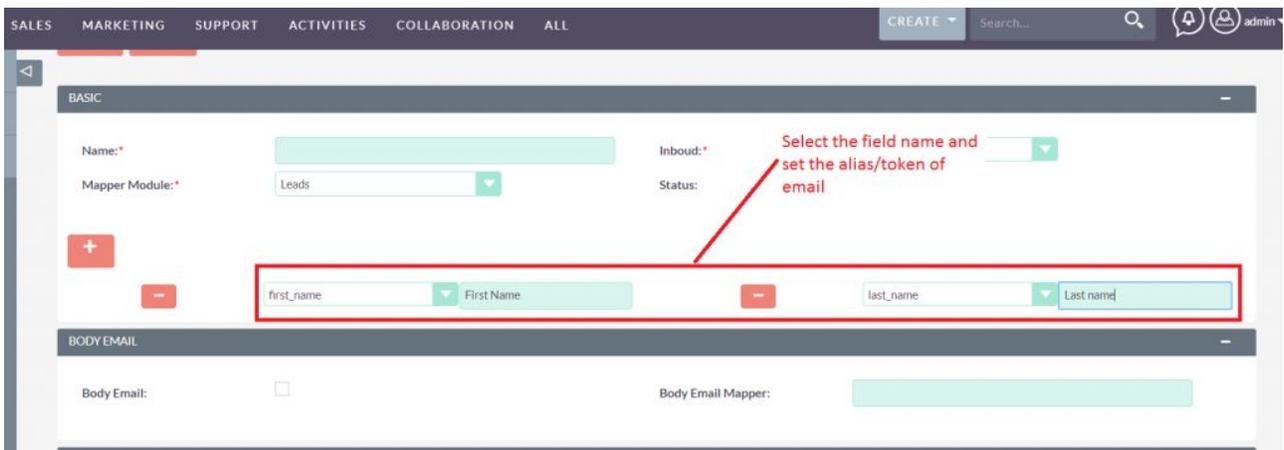


3. Select the Group Inbound email for record receiver.

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 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.

The screenshot displays the configuration interface for a SuiteCRM Record Receiver. At the top, there is a navigation bar with tabs for SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. A 'CREATE' button and search, notification, and user icons are also present. Below the navigation bar, the configuration is organized into sections: 'Mapper Module' (with a dropdown menu), 'Status' (set to 'Active'), 'BODY EMAIL' (with a 'Body Email' checkbox and a 'Body Email Mapper' field), 'ASSIGNMENT RULE' (with an 'Unassigned' checkbox and an 'Assigned to' field containing a user selection dropdown), and 'NOTIFICATION RULE' (with an 'Admin' checkbox and an 'Email Address' field). A red box highlights the 'Assigned to' field in the 'ASSIGNMENT RULE' section, with a red arrow pointing to it from the text 'Set the assignment rule of newly created lead'. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

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

ASSIGNMENT RULE

Unassigned:       Assigned to:

Checked for admin notify      Notify to any add-on email address

NOTIFICATION RULE

Admin:       Email Address:

9. Click on save after configuring all settings.

→ Click Here

BASIC

Name:       Inbound email:

Mapper Module:       Status:

+      -      -      -

BODY EMAIL

Body Email:       Body Email Mapper:

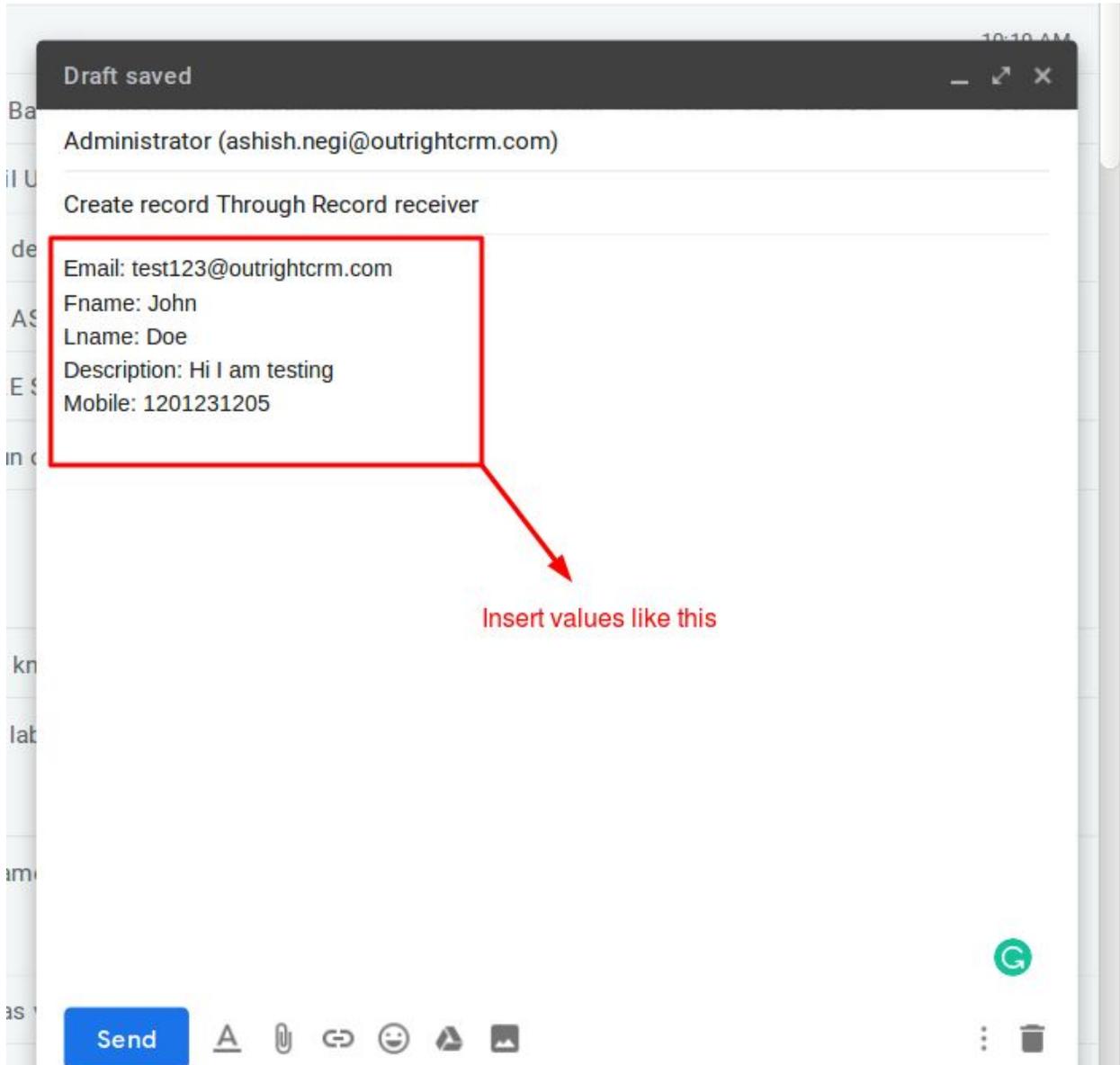
ASSIGNMENT RULE

Unassigned:       Assigned to:

NOTIFICATION RULE

Admin:       Email Address:

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 ☆

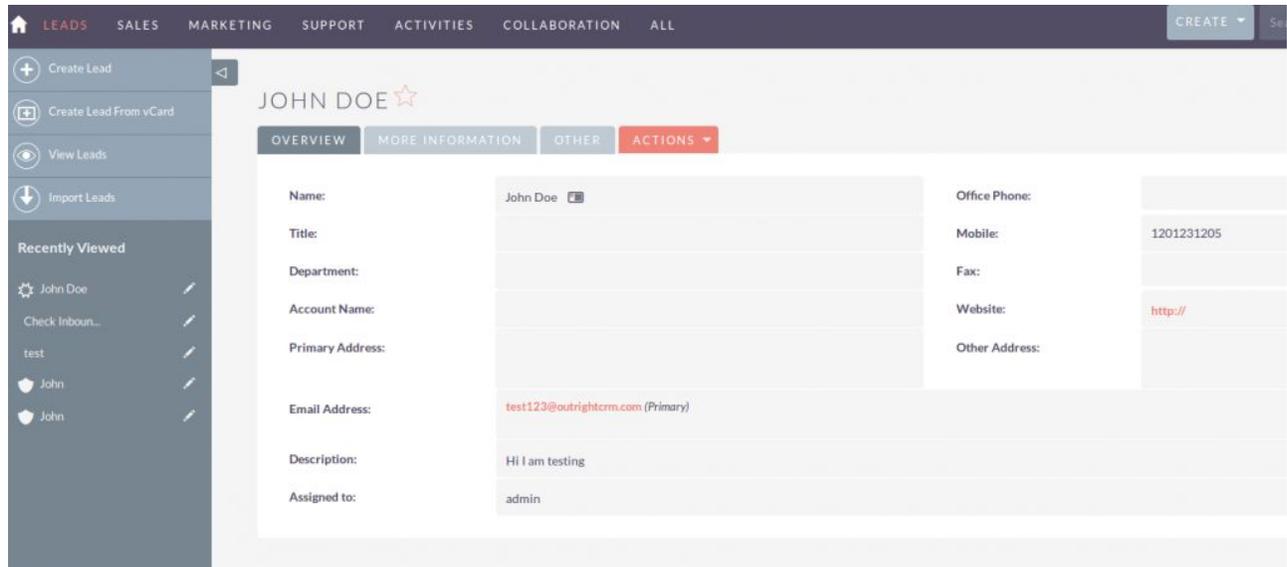
BASIC ACTIONS (10 of 14)

Job Name:	Check Inbound Mailboxes	Status:	Active
Date & Time Start:	01/01/2015 17:00	Active From:	Always
Date & Time End:		Active To:	Always
Last Successful Run:	04/12/2019 15:38	Interval:	As often as possible.
Execute If Missed:	<input type="checkbox"/>	Job:	function::pollMonitoredInboxesAOP
Date Created:	04/10/2019 16:39 by admin	Date Modified:	04/10/2019 16:39 by admin

JOB LOG

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



The screenshot displays the SuiteCRM interface for a lead record. The top navigation bar includes tabs for LEADS, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL, along with a CREATE button. The left sidebar contains options like Create Lead, Create Lead From vCard, View Leads, and Import Leads, along with a Recently Viewed list. The main content area shows the lead record for JOHN DOE, with tabs for OVERVIEW, MORE INFORMATION, OTHER, and ACTIONS. The record details are as follows:

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

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