



SugarCRM 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.

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version
Outright_min_utils	<input type="button" value="Uninstall"/>	<input type="button" value="Disable"/>	module	4.3

Select the record receiver.zip file

Click here to upload the record receiver.zip

Module No file selected.

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

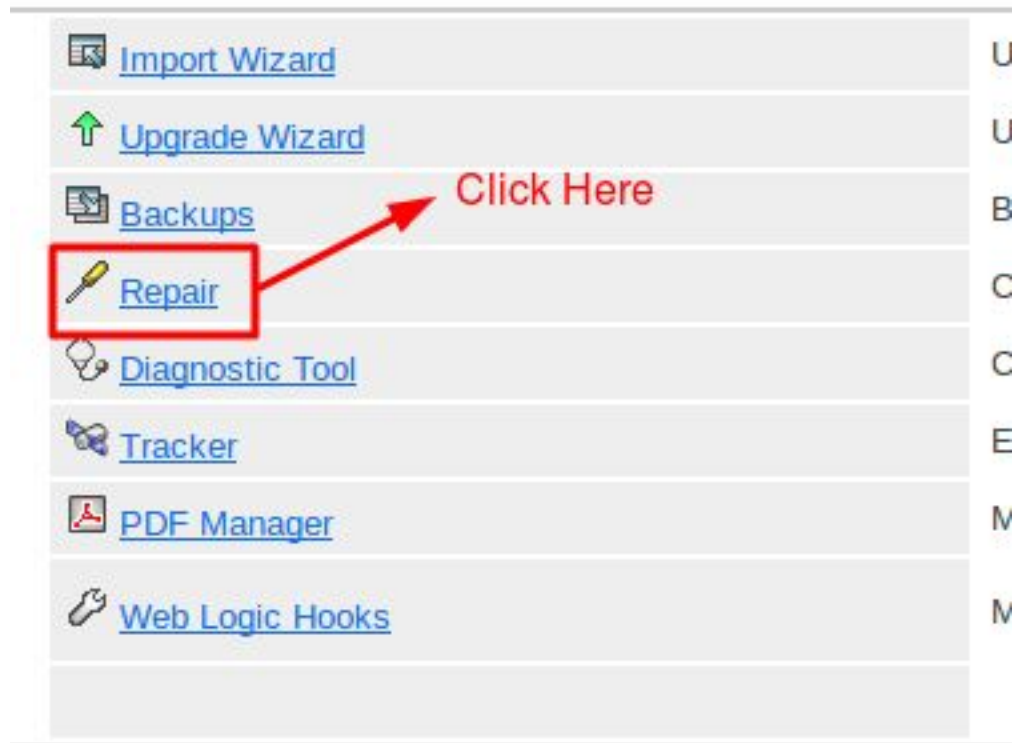
The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version
Outright_min_utils	<input type="button" value="Uninstall"/>	<input type="button" value="Disable"/>	module	4.3

Module No file selected. [Click Here to install](#)

Name	Install	Delete	Type	Version
Proreceiver	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module	7

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






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

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

Configuration Guide:-

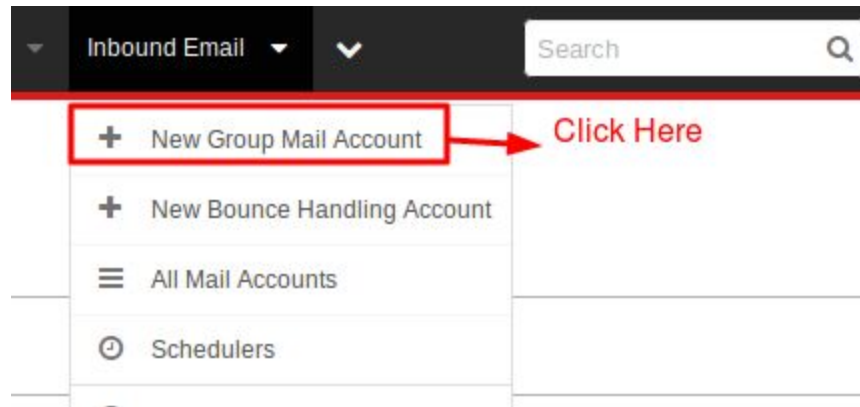
1. Go to the Administration page.
2. Click on the Inbound Email to configure the inbound email address.

letter campaigns.

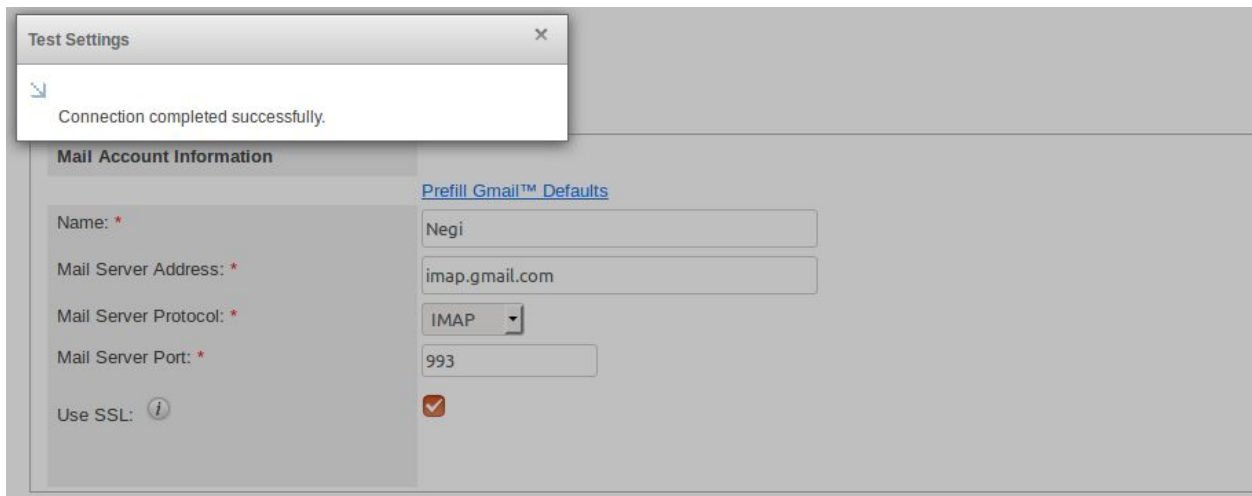
 Inbound Email	Set up group mail accounts for monitoring inbound email and manage personal inbound mail account information for users
el.  Campaign Email Settings	Configure email settings for campaigns
 Email Archiving	Enable/disable the Sugar Email Archiving Service

Click here

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.

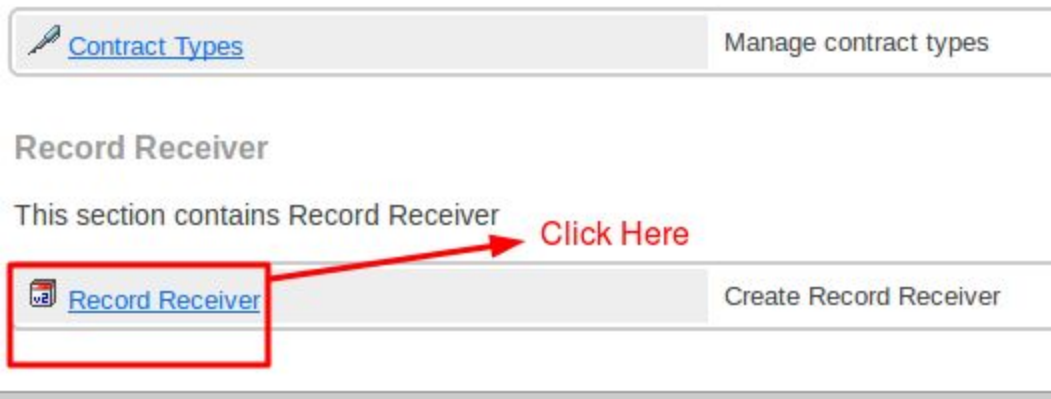


NOTE: after installing each plugin, It is mandatory to repair and execute.

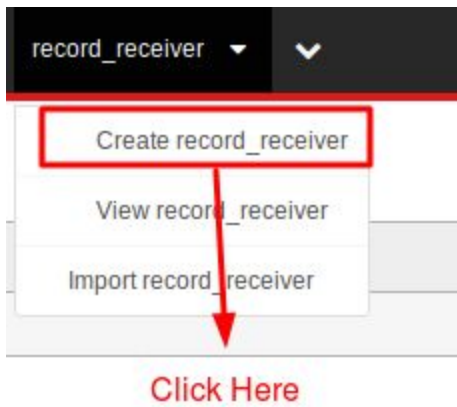
User Guide:-

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

Define contract types for the Contracts module. When users create a contract, the



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.

Save Cancel * Indicates required

Name: *

Status: Active

Mapper Module: * [Dropdown] Select the target module of email data parsing

Inbound email: * [Dropdown] Select the inbound group email for record receiver

Body Email

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

Save Cancel

Name: *

Status: Active

Mapper Module: * Leads

Inbound email: *

Lead Source Field:

first_name last_name

Select the field name and set the alias/token of email

Body Email

Body Email:

Body Email Mapper:

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.

Body Email

Body Email: Checked the body email for body email receiver and set the token for email address

Body Email Mapper: [Field]

Assignment Rule

Unassigned:

Auto Assign:

Assigned to:

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 Assigned to:
Auto Assign: Notify to any add-on email address

Notification Rule
Admin: Email Address:

9. Click on save after configuring all settings.

Click Here

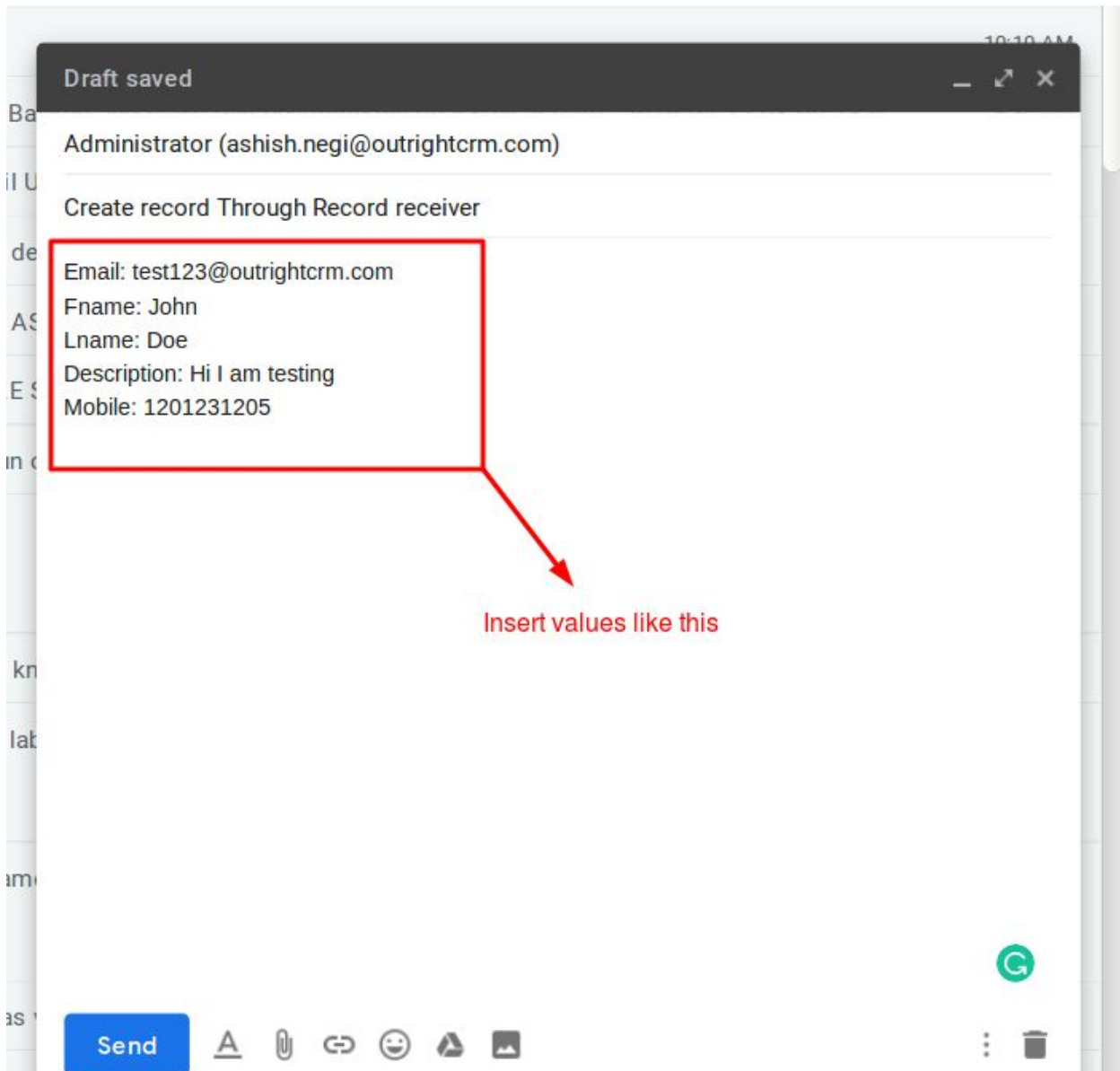
Name: * Test Inbound email: * ashish.negi@outrightcrm.com
Status: Active
Mapper Module: * Leads Lead Source Field:
first_name Fname last_name Lname
description Description phone_mobile Mobile

Body Email
Body Email: Body Email Mapper: Email

Assignment Rule
Unassigned: Assigned to:
Auto Assign:

Notification Rule
Admin: Email Address: Test@outrightcrm.com

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:	<input type="checkbox"/>	Job:	function:pollMonitoredInboxes
Date Created:	04/24/2019 01:33pm by Administrator	Date Modified:	04/24/2019 01:33pm by Administrator

A 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 shows a user profile header for 'John Doe' with a 'Following' status and an 'Unconverted' lead status. Below the header is a list of fields and their values:

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	Status Description
New	
Lead Source	Lead Source Description
Assigned to	Opportunity Amount
Administrator	

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