



SuiteCRM Email To Case

User Guide

Email to Anything Receiver Setting

1. Click on Step-4 i.e. View Receiver Setting.

Email to Anything by Outright Store

Create Email To Lead or anything

Step1:	License Activated
Step2:	Create more Inbound Email Settings
Step3:	Review All Inbound Settings
Step4:	Change Default Receivers

2. Here, you'll see an "AutoMatically Generated Receiver For {example@email.com}". Click on the pencil icon to go to Edit View.

EMAIL TO LEAD RECEIVER

Emailtolead Name	Status	Default Target	Field Value Separator	Secondary Target
<input type="checkbox"/> AutoMatically Generated Receiver For [outrightcrm31@gmail.com]	Active	Contacts	::	Cases

3. This is the Basic Configuration of the receiver.

AUTOMATICALLY GENERATED RECEIVER FOR {OUTRIGHTCRM31@GMAIL.COM}

BASIC	Switch Values	Dynamic Targets (Primary)	Assignment Rules	ACTIONS	< PREVIOUS	1 of 1	NEXT >
Primary Target:	Contacts	Secondary Target:	Cases				
EmailtoLoad Name:	AutoMatically Generated Receiver For {outrightcrm31@gmail.com}	Target Email Address:	outrightcrm31@gmail.com				
Status:	Active	Field Value Separator:	::				

- a. **Primary Target:** Select the primary module in which you want to save data and create records. In this case, it will be either contacts or accounts.
 - b. **Secondary Target:** Select the secondary module in which you want to save data and create records. In this case, it will be cases.
 - c. **Receiver Name:** Give a befitting name to the receiver setting.
 - d. **Target Email Address:** This receiver setting is applied to the email address mentioned here.
 - e. **Field value separator:** This is a key value separator e.g. Name: John. By default, it's colon (::), you can change it as per need.
 - f. **Status:** You can activate or deactivate the receiver using the status dropdown.
4. Click on the **Save** button after completing the basic configuration.

Send First Email

1. Compose a new email.
2. In TO, enter the inbound email address that you configured in SuiteCRM Email to Anything.
3. Sample email body-

Sample Email
From: sharma.mohit@outrightcrm.com (Mohit Sharma)
To: support@abcelectronics.com
Subject: Smartphone Issue - Urgent Help Needed! Hello ABC Electronics Support Team, I hope this email finds you well. I am facing an urgent issue with my smartphone, model XYZ-123. The touch screen is not responding properly, and the battery seems to drain very quickly. I have tried restarting the phone, but the problem persists. I depend on my phone for work, so I need this issue resolved as soon as possible. Please help!

Best regards,
Mohit Sharma

4. Send this email.
5. Wait for a few seconds and check the selected module.
6. A record will be automatically created in the Contacts and one related case. Check the screenshot below.

The image displays two side-by-side screenshots. The left screenshot shows a Gmail interface with an email titled "Smartphone Issue - Urgent Help Needed! [CASE:18]". The email content includes a "Customer Support" header, a timestamp of "5:10 PM (4 minutes ago)", and a body of text that is an automated response. The response text includes: "In replies all text above this line is added to the ticket", "Thank you for contacting us.", "This is an automated response confirming the receipt of your ticket. In order to help you as quickly as possible, have you thought about providing the following information:", "A detailed description of the issue", "General information about the project", "Firmware/Software versions", "Configuration backups", "Logging information such as event logs, icx logs, application logs, wireshark traces, etc.", "When replying, please make sure that the ticket ID is kept in the subject so that we can track your replies.", "Ticket ID: OTM-18", "Subject: Smartphone Issue - Urgent Help Needed!", "Department: Technical Support", "Status: New", "Priority: Medium", and "Ticket Summary:". At the bottom of the email, there are three buttons: "No, I did not.", "Yes, it is working.", and "I will send you the details.".

The right screenshot shows the Outright CRM interface. The top section is titled "CONTACTS" and displays a table with columns: Name, Job Title, Account Name, Email, and Office Phone. The table contains two entries: "Mohit Sharma" with email "sharma.mohit@outrightcrm.com" and "Smartphone Issue" with email "sharma.mohit@outrightcrm.com". Below the table are buttons for "ASSIGN" and "REMOVE", and a "Group" dropdown menu set to "--None".

The bottom section is titled "CASES" and displays a table with columns: Case #, Department, Status, Subject, and Created by contact. The table contains one entry: "OTM-18" in the "Technical Support" department, with a status of "New", subject "Smartphone Issue - Urgent Help Needed!", and created by "Mohit Sharma". Below the table are buttons for "ASSIGN" and "REMOVE", and a "Group" dropdown menu set to "--None".