

SugarCRM Email to Lead (Lite)

User Guide

Email to Lead (Lite)

Outright Store

User Guide:-

1. Go to the admin panel and click on the Inbound Settings option.

Outright Store Email to Lead or Any Mo	dule (Lite Version)			
Outright Store Email to Lead or Any Module (Lite	Version)			
Inbound Settings	Create New Inbound Settings	Inbound Settings Click here	Sell All Inbound Settings	
S Email Manager for receiver archiver	Record Receiver Manager	Email To Lead Receiver	Create Record Receiver	
C Email To Lead Logger	Record Receiver Logger	C Email2lead Process Audit	Process Audit	
			Activate Window	

2. Here you can see the inbound email address set as archiver.

📚 👻 Product Catalog 👻 Calendar 👻 Calls 👻 Meetings 👻	Tasks 🕶 Notes 🕶 R	eports 💌 Leads	▼ Contacts ▼ Accounts ▼ Opportunit	cies 🕶 Emails 👻 Campaigns	▼ Targets ▼ Inbound Settings	I Search	a 💿 🤶	• +
Inbound Settings								
From Name My Items D Search Clear	Advanced Search							2
Delete +							(<u>ici</u> @ (1 - 1 of 1) 🛞	
From Name 👙	IMAP Success Message	Status ©	Mail Server Address (e.g imap.gmail.com)	© Email Address as Archiver	If Custom Date , then Select Date	Target Folder (e.g. INBOX)	Mail Server Protocol (tls/ssl)	0
□ ☆ Ø outrightcrm19@gmail.com	Last Validation MESSAGE - >SUCCESSFULLY CONFIGURED	1	imap.gmail.com	outrightcrm19@gmail.com	04/06/2021	INBOX	ssi	
Delete Target inbound email							(iii (i - 1 of 1) 🕥	

3. Click on the Email to Lead Receiver option.

Outright Store Email to Lead or Any Mo	dule (Lite Version)		
Outright Store Email to Lead or Any Module (Lite	Version)		
3 Inbound Settings	Create New Inbound Settings	Inbound Settings	Sell All Inbound Settings
S Email Manager for receiver archiver	Record Receiver Manager	Email To Lead Receiver Click here	Create Record Receiver
C Email To Lead Logger	Record Receiver Logger	Email2lead Process Audit	Process Audit

4. Here you can see the target module and other options.

Default automated Settings	for->outrightcrm19@gmail.	com » Edit					
Save Cancel View Audit Log							(1 of 1) (3) * Indicates required field
Default Target: *	Leads	~	Select any module	Emailtolead Name: "	Default automated Settings for->outright	c	
Status:	Active 👻			Target Email Address: *	outrighterm19@gmail.com		
Take New Fields from Field Mapper.	0						
Email Example:							
A Customer Source Settings(Ema	il Mapper)						
No Email Key:				Pull Customer Email from FromEmail			
Body Email Mapper:							
A DUPLICATE DETECTION							
Email Sender + Subject							
Check Dunlicate on Phone Number	15						

5. Click on the Email to Lead process Audit Option.

Outright Store Email to Lead or Any Mo	dule (Lite Version)		
Outright Store Email to Lead or Any Module (Lite	Version)		
Inbound Settings	Create New Inbound Settings	Inbound Settings	Sell All Inbound Settings
S Email Manager for receiver archiver	Record Receiver Manager	Email To Lead Receiver	Create Record Receiver
C Email To Lead Logger	Record Receiver Logger	Email2lead Process Audit Click here	Process Audit
			Activate Windows

6. In the process audit, there is no record yet.

📚 🔹 Product Catalog 🔹 Calendar 🔹 Calls 👻 Meetings 👻 Tasks 👻 N	rs 👻 Reports 👻 Leads 👻 Contacts 👻 Accounts 👻 Opportunities 👻 Emails 👻	Campaigns	a 💿 🤶 - +
Email2lead Process Audit			
Route ID Parent ID	Parent Type	Email Route	
My Items			
Search Clear Advanced Search		3	
You currently have no records saved. Create one now.	No records created yet		

7. In the Leads module, there is no record yet as well.

📚 👻 Product Catalog 👻 Calendar 👻 Calls 👻 Meetings 👻 Tasks 👻	Notes • Reports • Leads •	Contects + Accounts +	Opportunities - Emails - Campaigns - Targets -	Target Lists - Quotes - E Search Q	0 🤶 +
Leads 0 No record in lead module yet					Create
Filter * Create 🖸 Search by first name, last name					0 🖩 0
Select	•				- +
Enter new filter name					Reset Cancel Save
🔲 👻 Name 🗢 Status	Account Name	Office Phone © Email	@ User	Φ Date Modified 6	Date Created
					,

8. Insert inbound email in the "To" field and in body, enter mapper fields. Then send the email.



9. Go to the process audit and refresh page. Her you'll see fetched record.

😂 🕶 Product Catalog 👻 Calendar 👻 Calls	▼ Meetings ▼ Tasks ▼ Notes ▼ Reports ▼ Lea	ds - Contacts - Accounts - Opportunities - Emails -	• Campaigns • Targets •	Email2lead Process Audit	Search	a 💽 🤶	• +
Email2lead Process Audit							
Route ID	Parent ID	Parent Type		Email Route			
My Items							
Search Clear Advanced Search				3			
Delete v						🛞 (1 - 1 of 1) 👩	(15)
Email2Lead Process Audit 👙	Route ID 😄		Parent ID 😄	Parent Type 👙	Date Created	÷	
🗆 🚔 🥝 CLICK TO VIEW RECORD	Process Auit for Default automated Settings for >outright	crm19@gmail.com For module :	67caef1c-9841-11eb-a14c- 02e9311bd7bb	Leads	04/08/2021 081)7am	
Delete +	After refresh, you can see a new record					🕜 (1 - 1 of 1) 🧕	(H)

10. In the Leads module you can see a new record is created.

📚 👻 Product Catalog 👻 Calenc	dar 🕶 Calls 🖛 Meetings 🖛 T	fasks 🕶 Notes 👻 Reports 💌	Leads 👻 Contac	s 👻 Accounts	 Opportunities - Emails 		Targets 👻 Target Lists 👻	Quotes 🕶 🚦	Search	۹ 🕜		• +
Leads (1)											Cr	reate
Filter - Create O Search by first name, I	last name										0	m 0
Select		•										- +
Enter new filter name	Record is created in the	e Leads module as well								Reset	t Cancel	Save
🗆 👻 Name	tatus	Account Name	Office Ph	ine ¢ Email		¢ User			Date Modified	¢ Da	ite Created	٥
🗌 🏫 Test Email to Lead	New		9876543	210 sharma.	mohit@outrighterm.com				04/08/2021 01:37pm	04	/08/2021	۰ -

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11. All the values are attached to their respective fields.

📚 👻 Product Catalog	• Calendar • Calls • Meetings • Tasks • Note	s • Reports • Leads •	Contects *	Accounts * Opportunities *	Emails 👻	Campaigns 👻	Targets 👻 Target Lists	• Quotes • I	Search	۹	0	2- +	÷
Le Test Email to	Lead 🌣 Unconversed			Loading								Edit 👻	
(+ Title					Mobile	9898989898]						
Website	http://www.xyz.com				Do Not Call								
+ Account Name					+ Tags								
+ Primary Address				+ Alter	ate Address								
Department	Sales				Office Phone	9876543210]						
🕈 Campaign					+ Fax								
+ Twitter Account				D&	Principal Id								
+ Description				E	nail Address	sharma.mohit@	Poutrighterm.com						
Status	New			1 + Statu	Description								
+ Lead Source				+ Lead Source	Description								
+ Assigned to				+ Opportu	nity Amount								
Date Created	04/08/2021 01:37pm by outright SYSTEMS				Teams	Global (Primary)							
Date Modified	04/08/2021 01:37pm by outright SYSTEMS												
Show less													

12. Latest Email is attached to the email subpanel.

	Product Catalog 👻 Calendar	▼ Calls ▼ Mee	dings 🕶 Tasks	• Notes •	Reports 👻	Leads 💌	Contacts 👻	Accounts 👻	Opportunities 👻	Emails 💌	Campaigns 👻	Targets 💌	Target List	s ≠ Q	uotes 👻	I	Search	۹	0	2 -	-
Le	Test Email to Lead 合	Unconverted																		Edit	•
(i) (i)	ALLS																			+	•
(1/e) M	eetings (0)																			+	*
Em EN	IAILS (4)		Latest	email attach	led to the h	istory.														+	•
_	From	Subject						φ Status		•	Date		Ø Assig	ned To		0	Related To			0	
슈	sharma.mohit@outrightcrm.com	Test Email2Lead L	ite Version					Archive	d				outri	ght SYSTEM	VIS		Test Email to Lead		_	۲	
☆	sharma.mohit@outrightcrm.com	Test Email2Lead L	ite Version					Archive	ed.				outri	ght SYSTEN	MS					۲	
습	sharma.mohit@outrightcrm.com	Test Email2Lead L	ite Version					Archive	ed				outri	ght SYSTEM	VIS					۲	

13. By clicking on the email, you can see the detail view of it.

Test Email2Lo	ead Lite Version 🛱				Reply
From	sharma.mohit@outrightcrm.com	Date			
То	outrightcrm19@gmail.com				
Body	First_name : Test Email to Lead Office Phone : 9876543210 Mobile: 9898989898 Website : www.xyz.com Department : Sales	Entire	email is saved	Â	
	=20 "The information shared=C2=A0by=C2=A0Outright Systems=C2=A0in this tra- sion or any=20 attachments is confidential or may be legally privileged, and is intended= =20 you are not the person to whom or the organization to which is addressed. If= =20 you are not the intended recipient, you should not disseminate, distribute= =20 or copy this email. Please notify the sender immediately by return-email if= =20 or copy this email. Please notify the sender immediately by return-email if= =20 or under the end of the sender immediately by return-email if= =20 from your system. E-mail transmission cannot be guaranteed to be secure or= =20 error-free as information could be intercepted. corrupted. lost. destroved.=	insmis=			
Attachments					
Cc		Bcc			
Assigned To	outright SYSTEMS	Lead	Test Email to Lead		
Teams	Global (Primary)				
+ Tags					