SugarCRM Email to Lead (Lite)

User Guide

User Guide:-

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

2. Here you can see the inbound email address set as archiver.
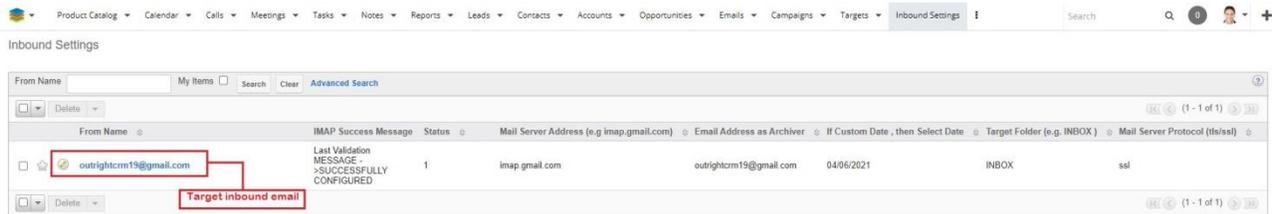
3. Click on the Email to Lead Receiver option.

4. Here you can see the target module and other options.
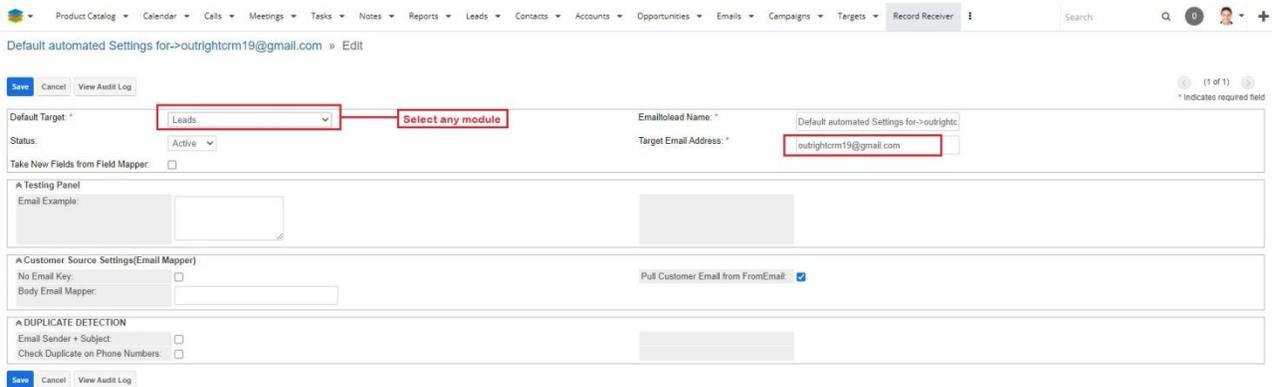
5. Click on the Email to Lead process Audit Option.

Outright Store Email to Lead or Any Module (Lite Version)

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Inbound Settings	Create New Inbound Settings	Inbound Settings	Sell All Inbound Settings
Email Manager for receiver archiver	Record Receiver Manager	Email To Lead Receiver	Create Record Receiver
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.

Email2lead Process Audit

Route ID		Parent ID		Parent Type		Email Route	
My Items	☐						

Search   Clear   Advanced Search

You currently have no records saved. Create one now. — No records created yet
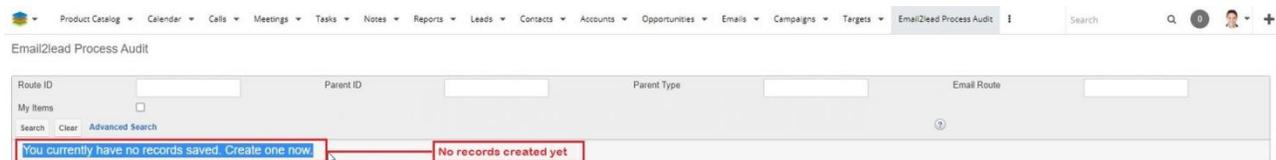
7. In the Leads module, there is no record yet as well.

Leads (0) — No record in lead module yet

Filter ▾ Create ✕ Search by first name, last name...

Select...

Enter new filter name...

| ☐ ▾ | Name | | Status | | Account Name | | Office Phone | | Email | | User | | Date Modified | | Date Created | |
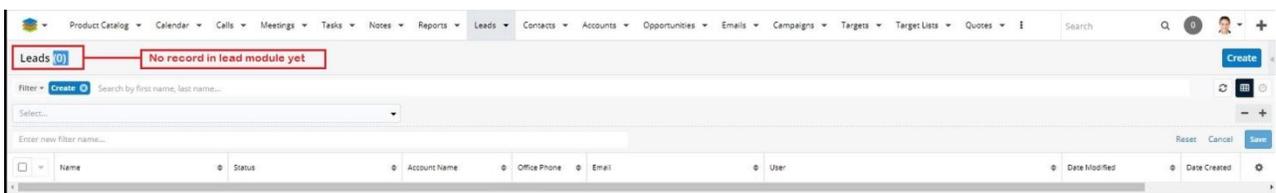
8. Insert inbound email in the "To" field and in body, enter mapper fields. Then send the email.
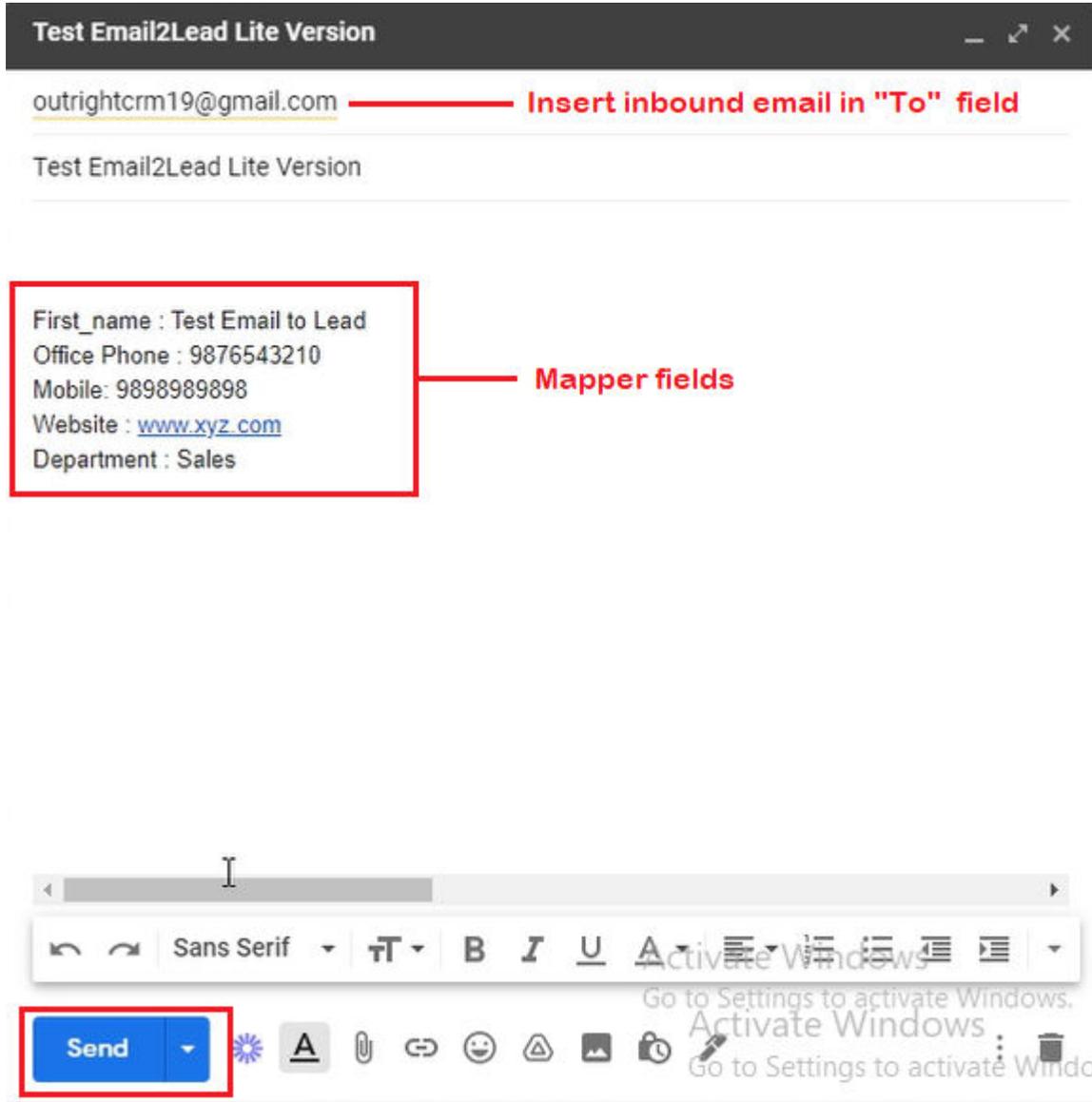
9. Go to the process audit and refresh page. Her you'll see fetched record.
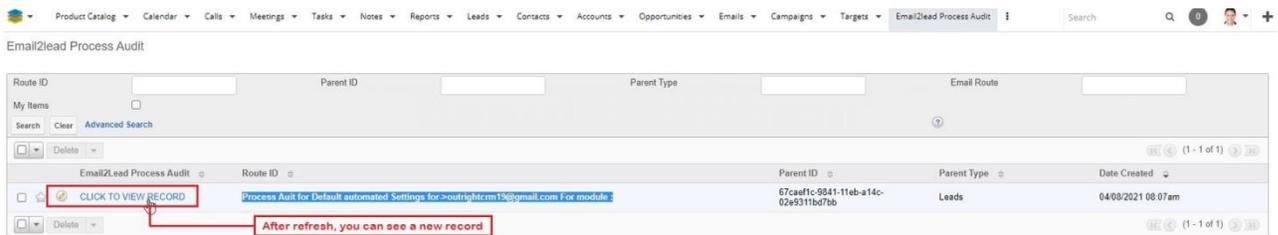
10. In the Leads module you can see a new record is created.
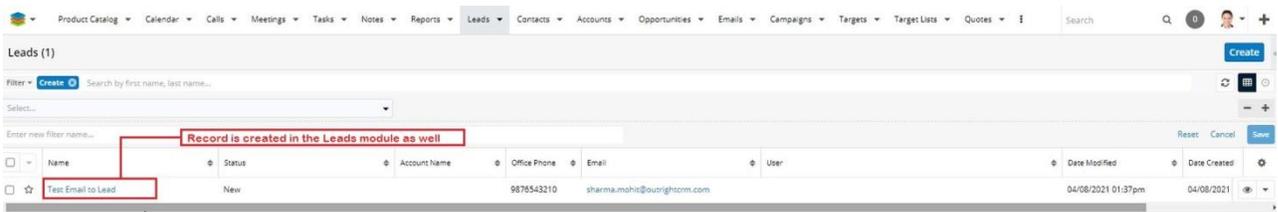
11. All the values are attached to their respective fields.
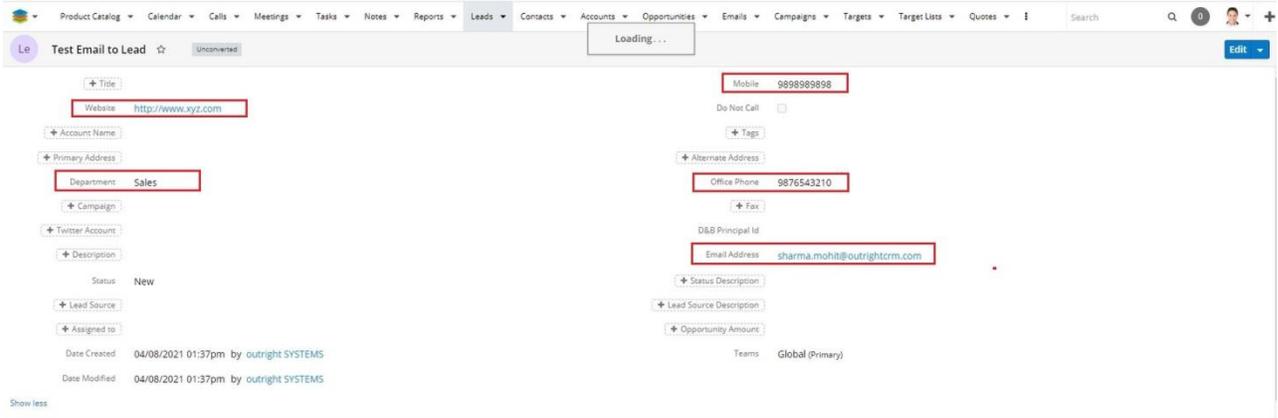
12. Latest Email is attached to the email subpanel.
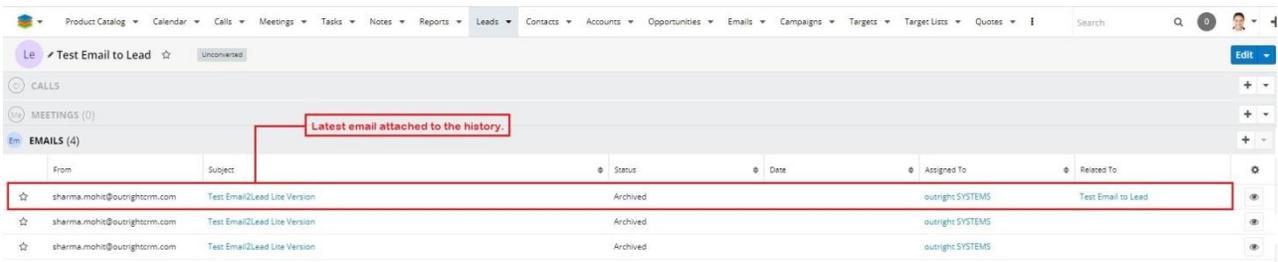
13. By clicking on the email, you can see the detail view of it.