SuiteCRM Record Receiver

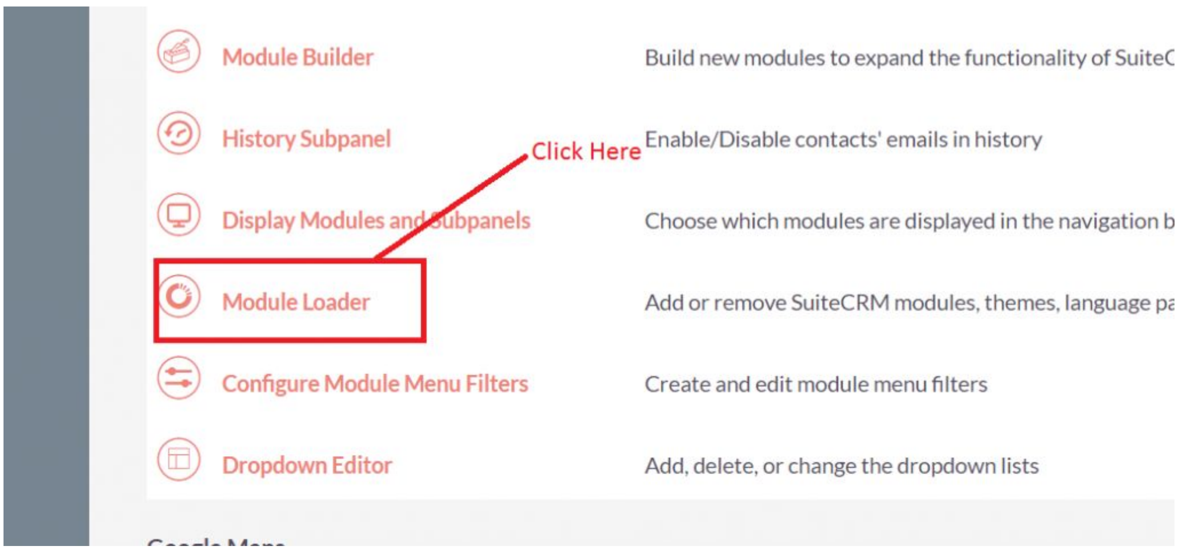
Pre-requisites

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.

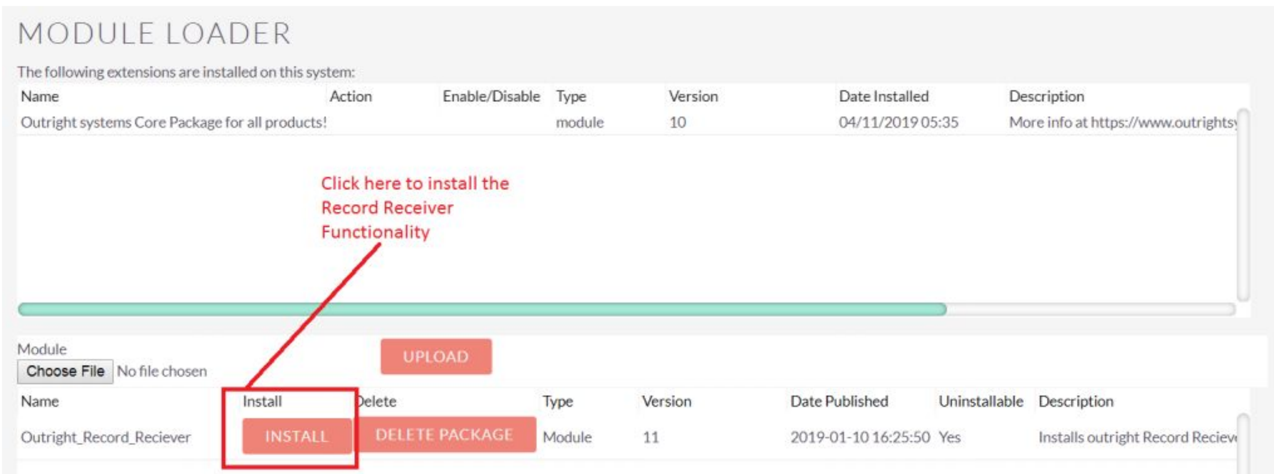
Installation Guide:-

1. Go to the Administration page.
2. Click on “**Module Loader**” to install the package.

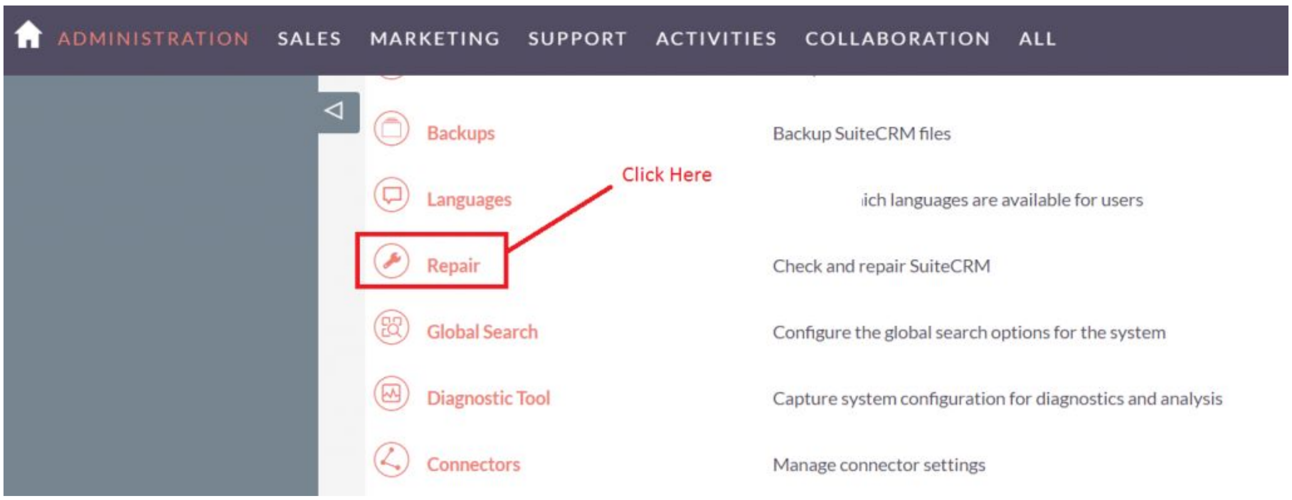


3. Click on "**Choose File**" button and select the Record Receiver.zip.

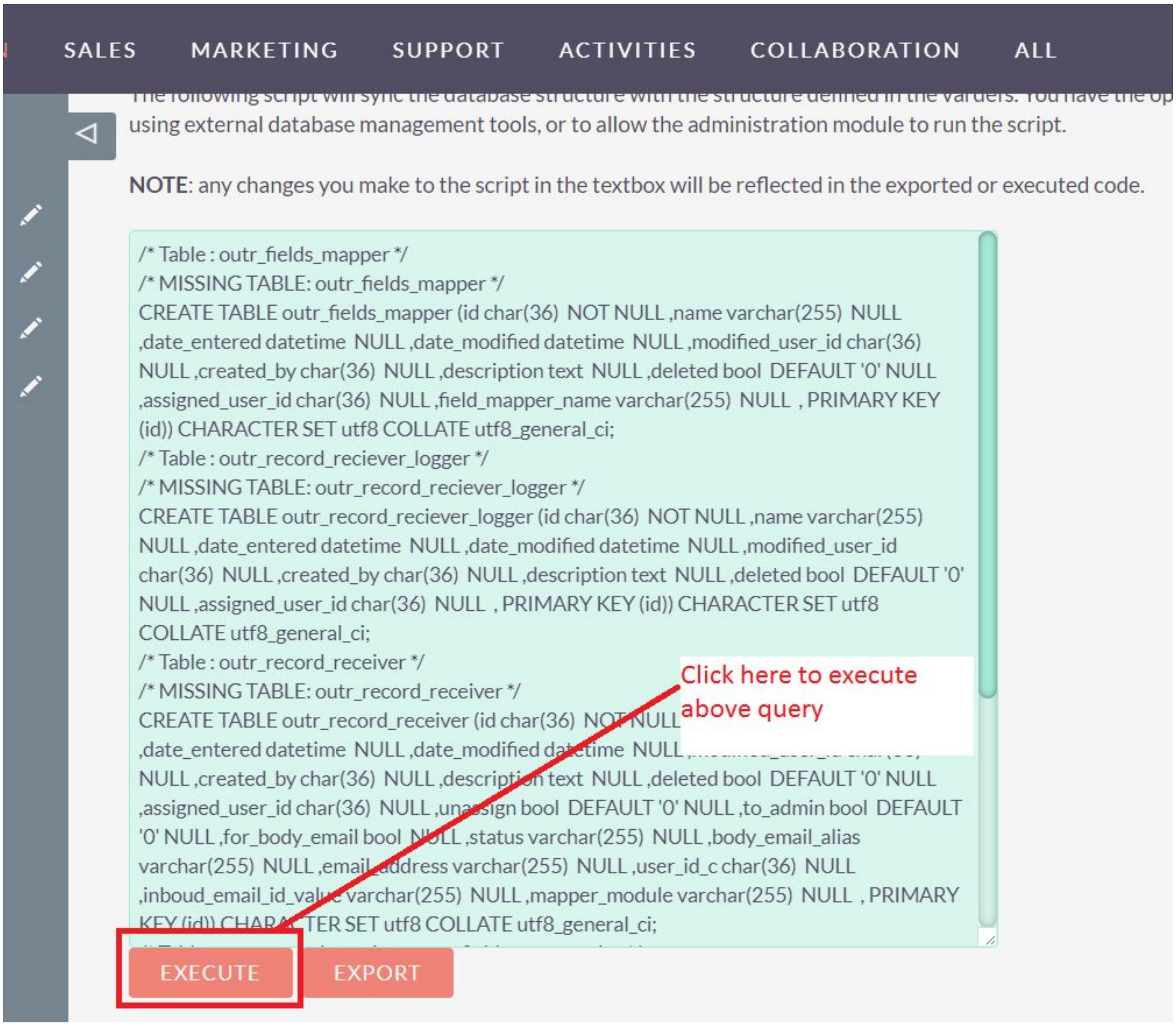
4.Click on "**Upload**" to upload the file in CRM and then click on the Install button.



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



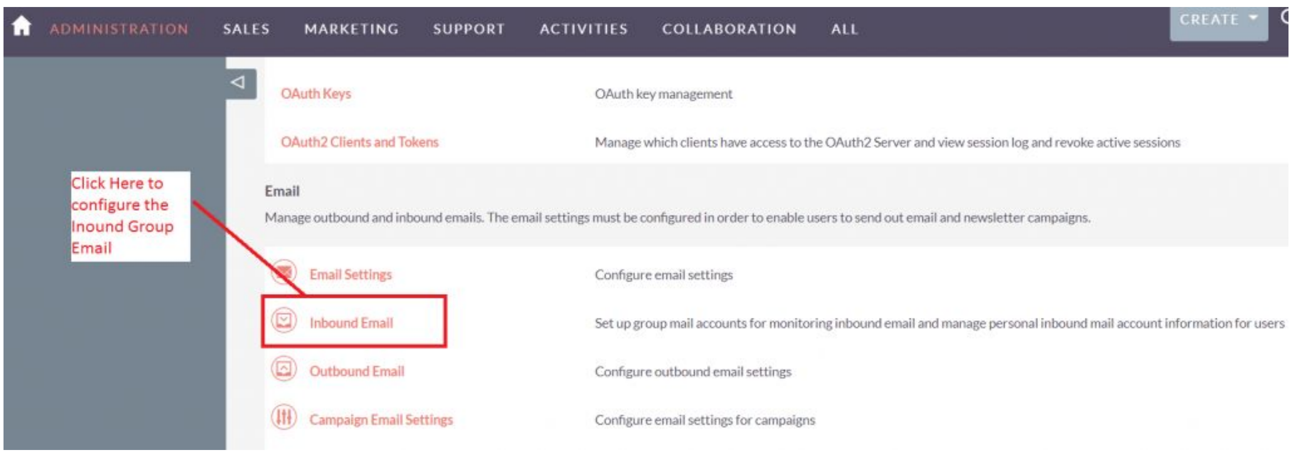
6.Click on "**Quick Repair and Rebuild**" and click on execute button.



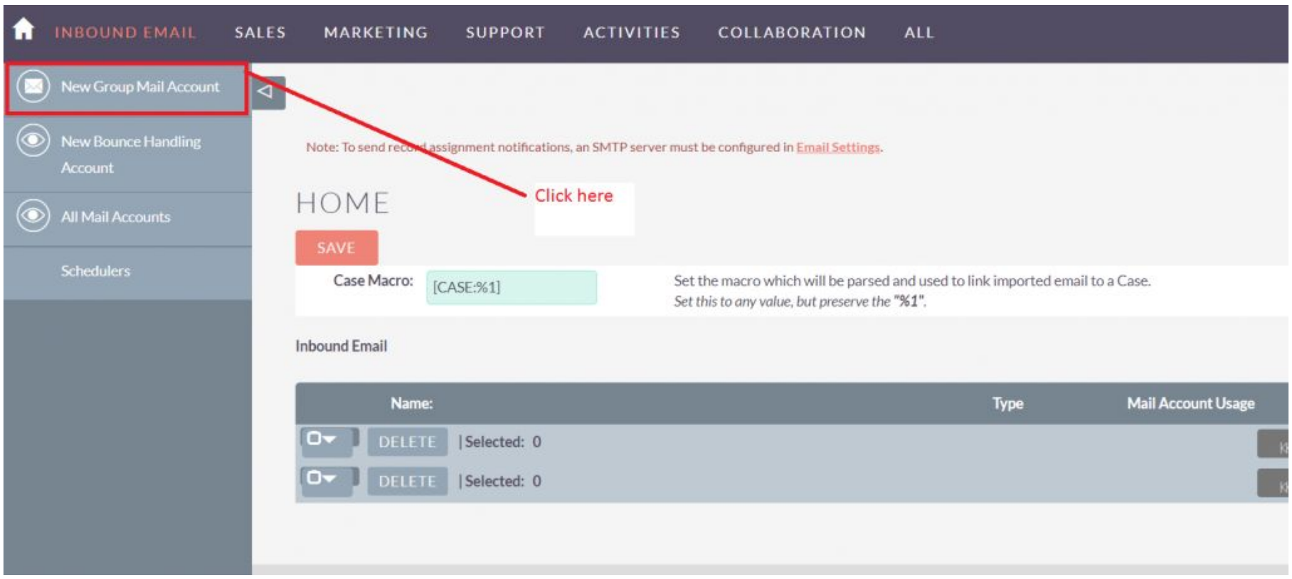
NOTE: after installing each plugin, It is mandatory to repair and execute.

Configuration Guide:-

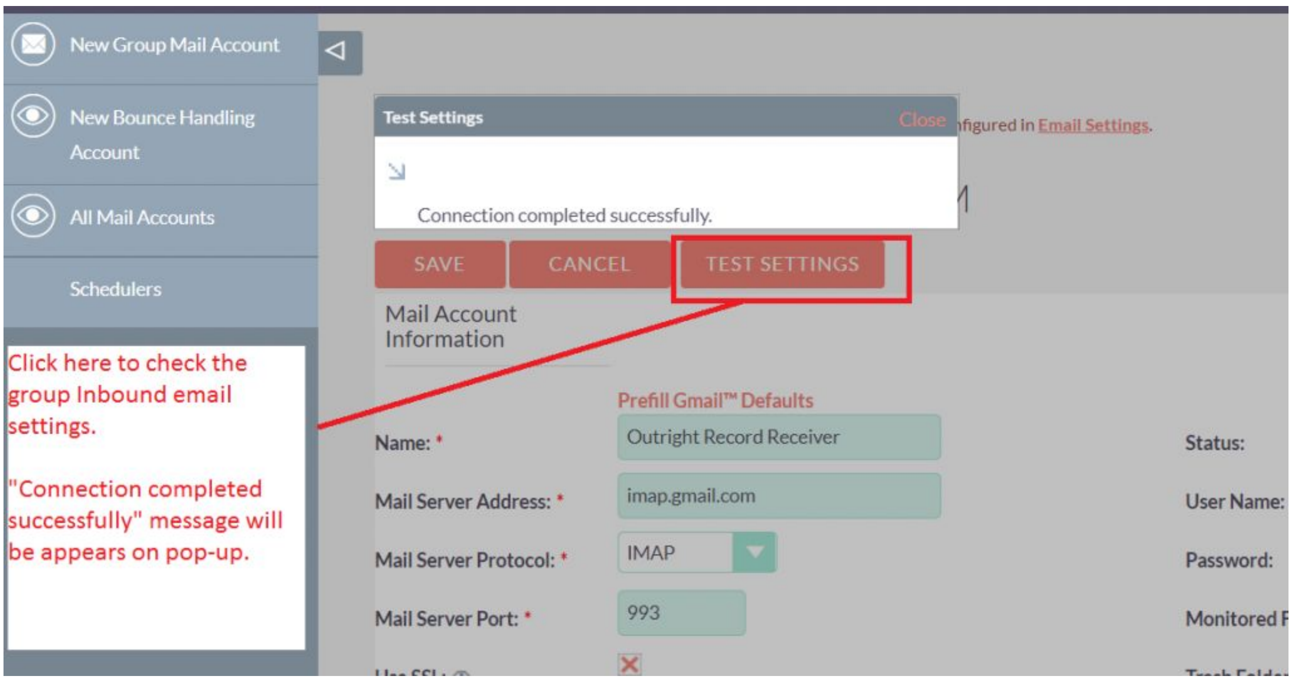
1.Go to the Administration page.
2. Click on the Inbound Email to configure the inbound email address.



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



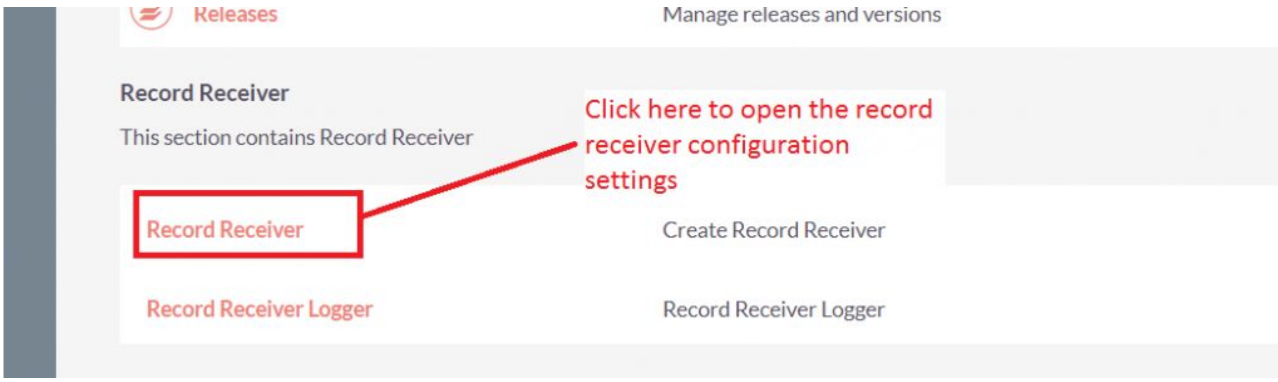
4.Click on "**Test Settings**", observe that "**Connection completed successfully**" should appear on Pop-up.



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

User Guide:-

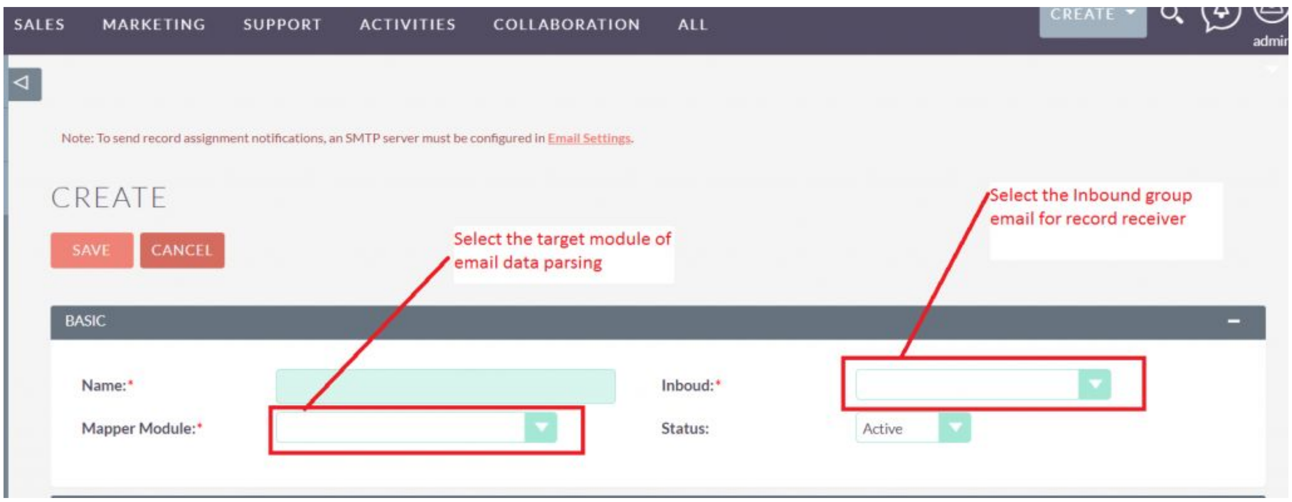
1.Go to the Administration page and click on Record Receiver.



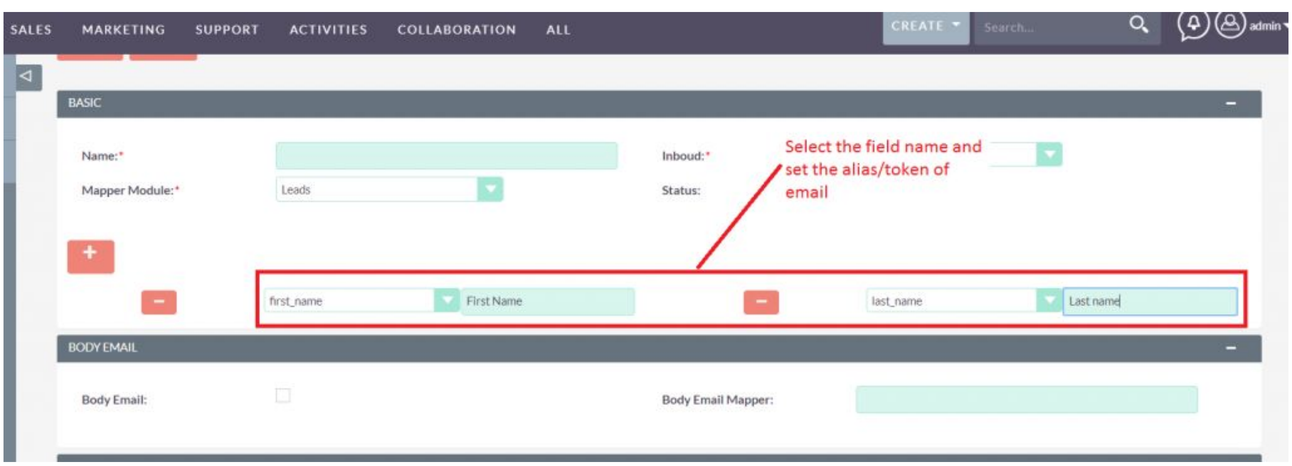
2.Click on "Create Record Receiver" to configure the setting

3.Select the Group Inbound email for record receiver.

4.Select the mapper module to save the record like Lead.



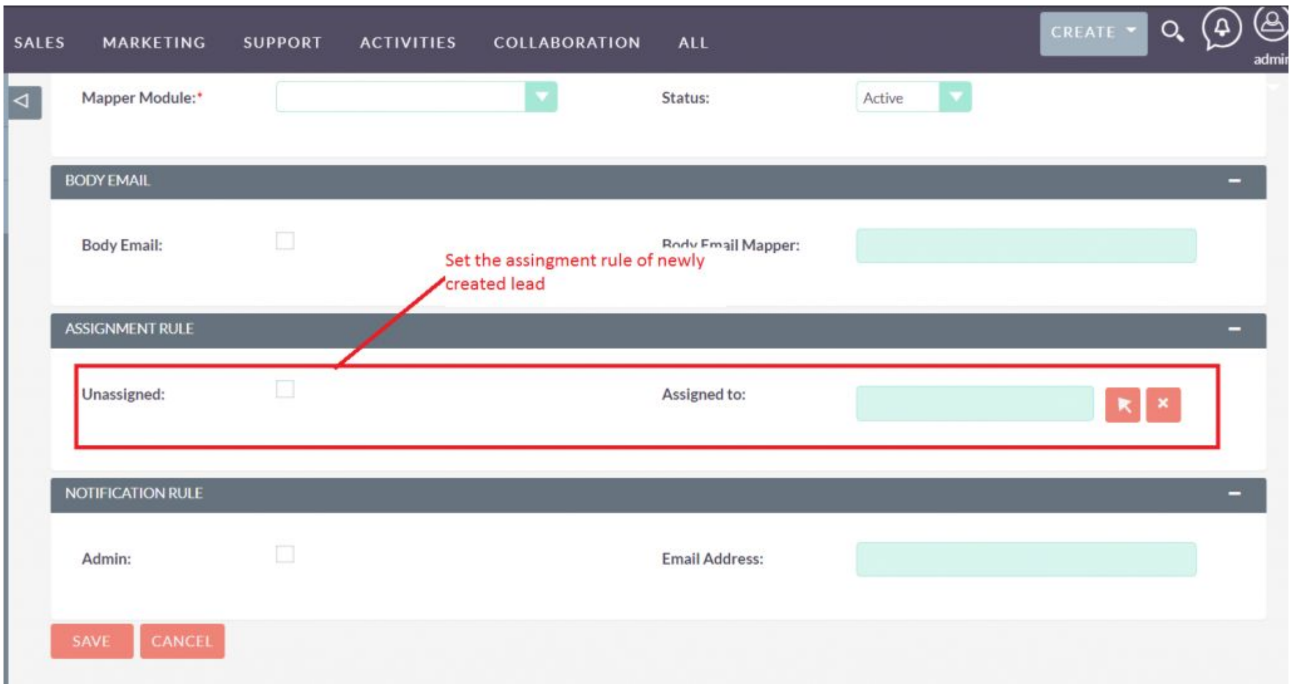
5.Select the fields for mapping and create the "Aliases" for the fields.



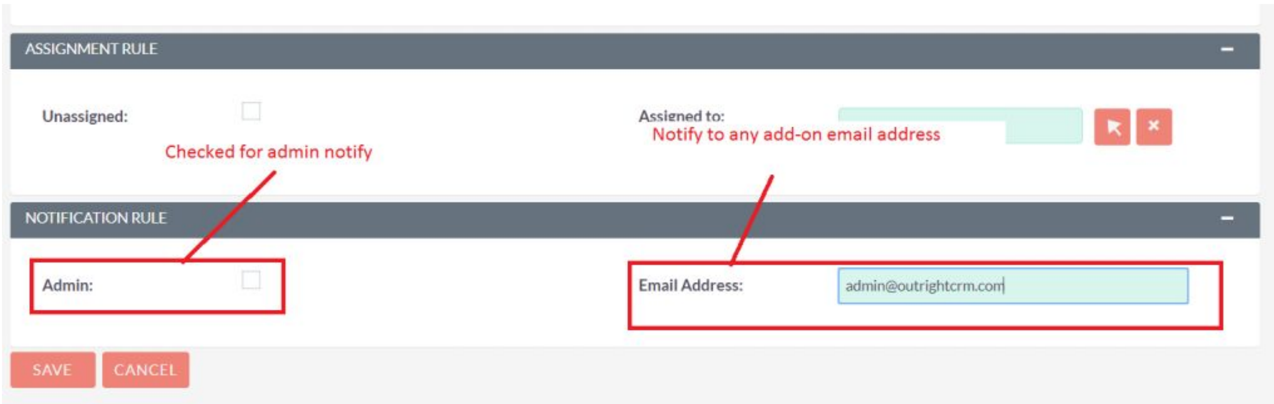
6.Checked the body email checkbox if you want to create the lead from body email address and set the alias for the email address.

Note: If you are checking Body email mapper then must use the mapper because it is the mandatory Field.

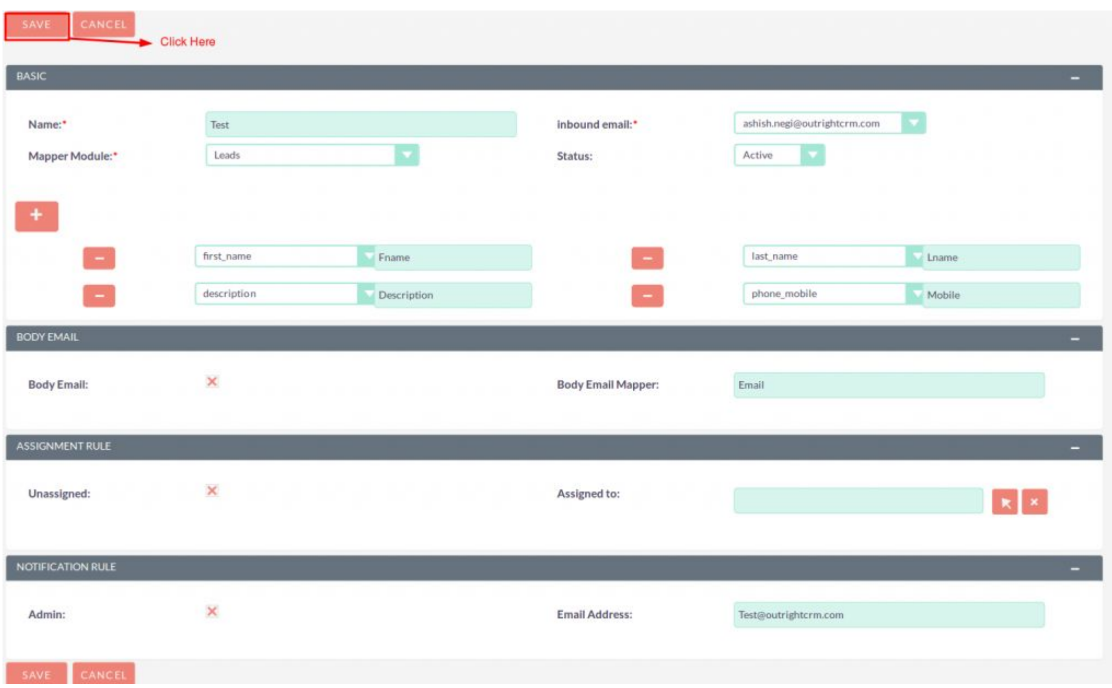
7.Setup the assignment rule for the newly created record.



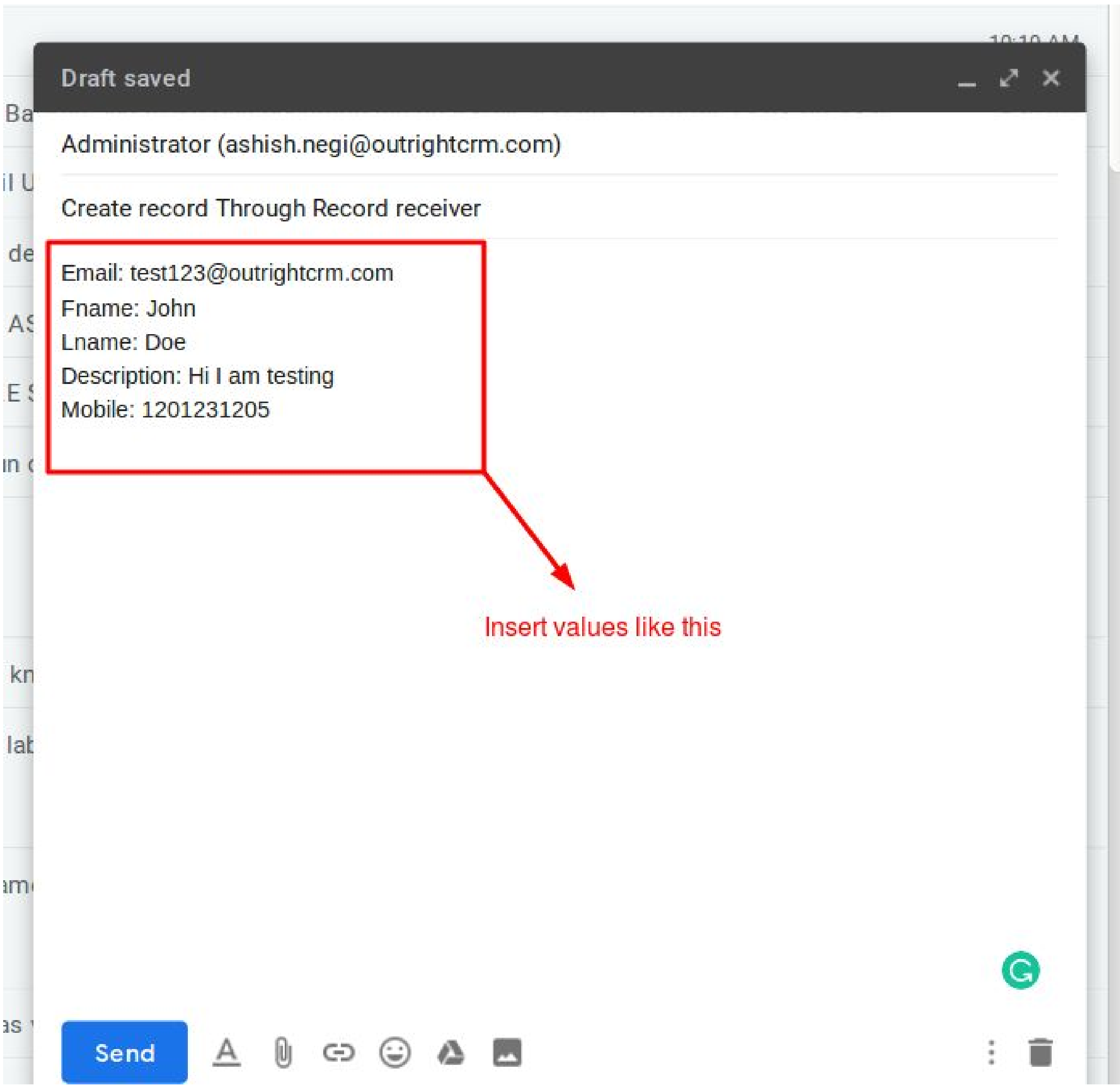
8.Setup the notification rule for the newly created record.



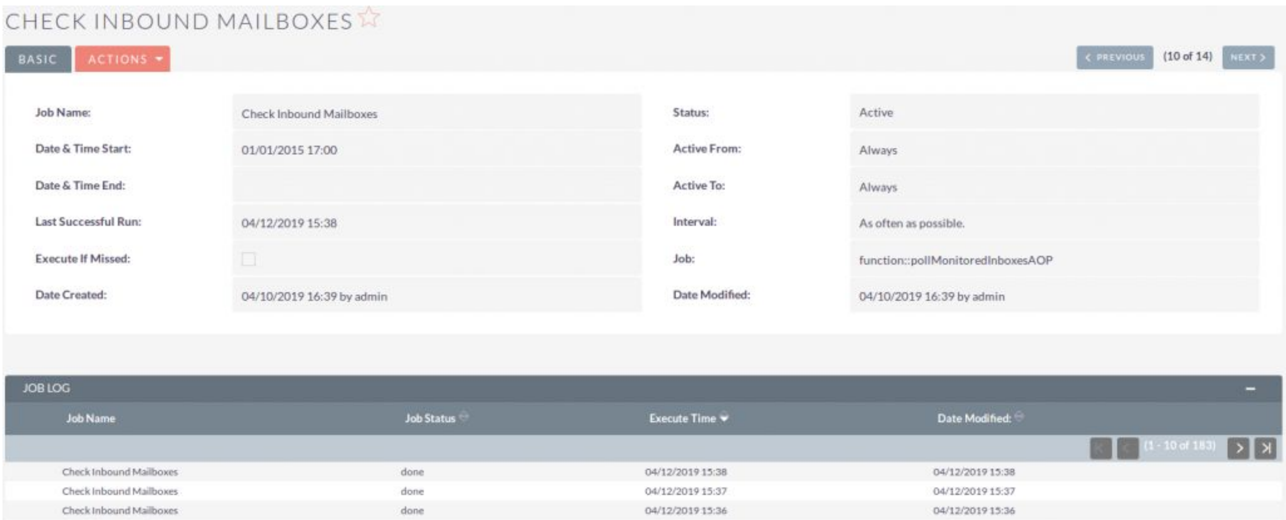
9.Click on save after configuring all settings.



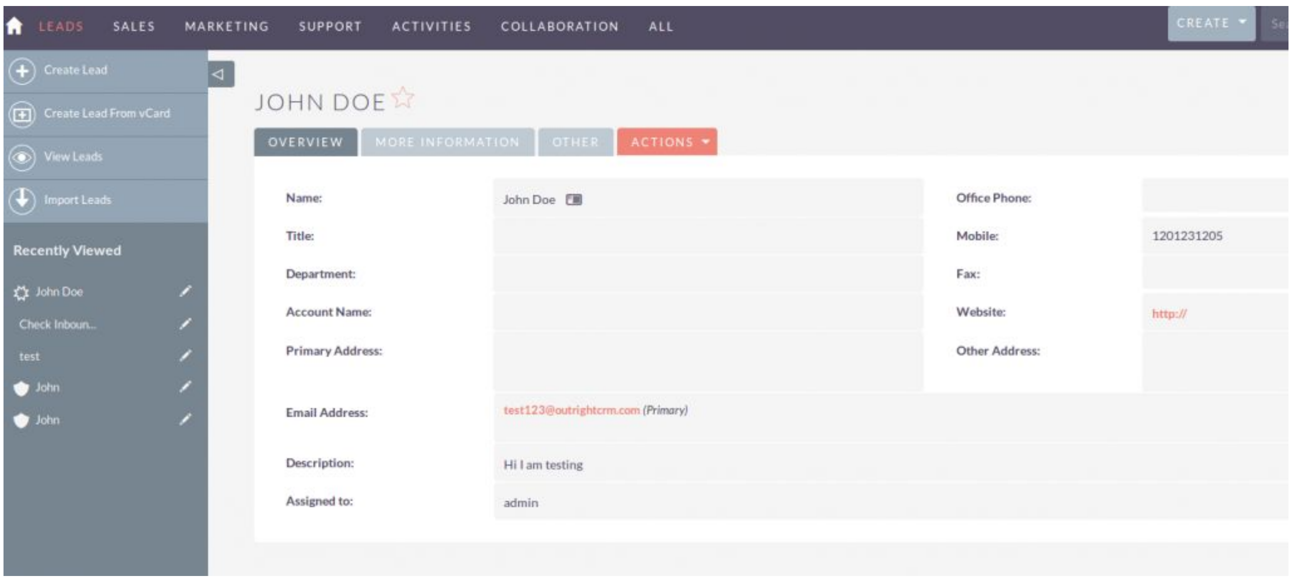
10.Go to email and send the mail to the setup inbound email with all mapped fields.



11. Go to Scheduler and check the "Check Inbound Mailboxes" job, the Scheduler must be working for this functionality.



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



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