



## **SuiteCRM** Record Receiver

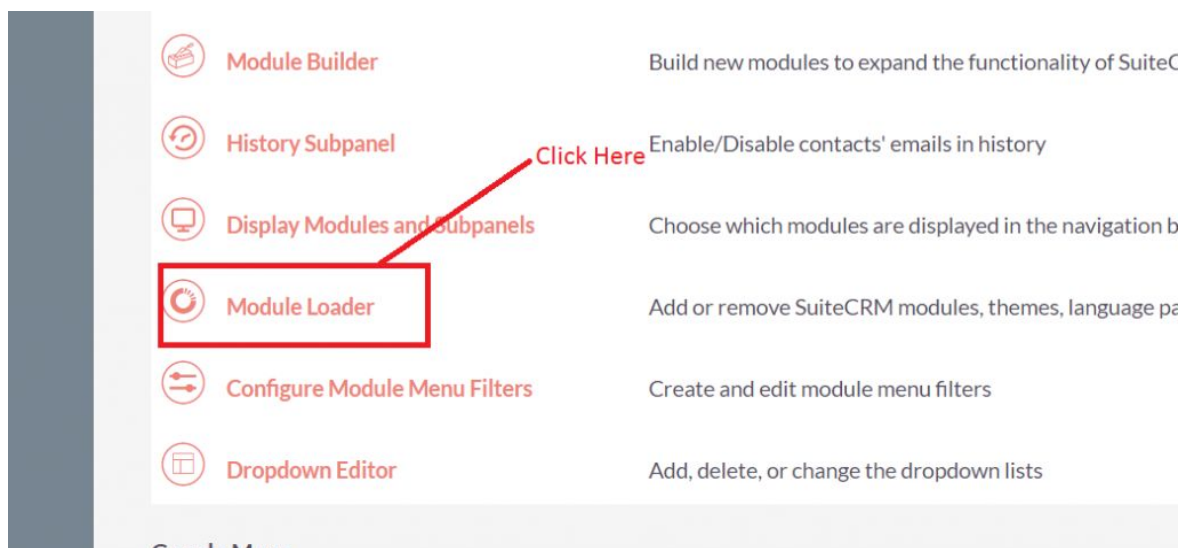
## Pre-requisites

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.

MODULE LOADER

The following extensions are installed on this system:

| Name  | Action | Enable/Disable | Type   | Version | Date Installed   | Description  |
|---|--------|----------------|--------|---------|------------------|--|
| Outright systems Core Package for all products! |        |                | module | 10      | 04/11/2019 05:35 | More info at <a href="https://www.outrightsystems.com">https://www.outrightsystems.com</a> |

Select the Record Receiver.zip file

Click here to upload the record receiver.zip

Module

Choose File outright\_recor...eciever11.zip

UPLOAD

| Name | Install | Delete | Type | Version | Date Published | Uninstallable | Description |
|------|---------|--------|------|---------|----------------|---------------|-------------|
|------|---------|--------|------|---------|----------------|---------------|-------------|

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

MODULE LOADER

The following extensions are installed on this system:

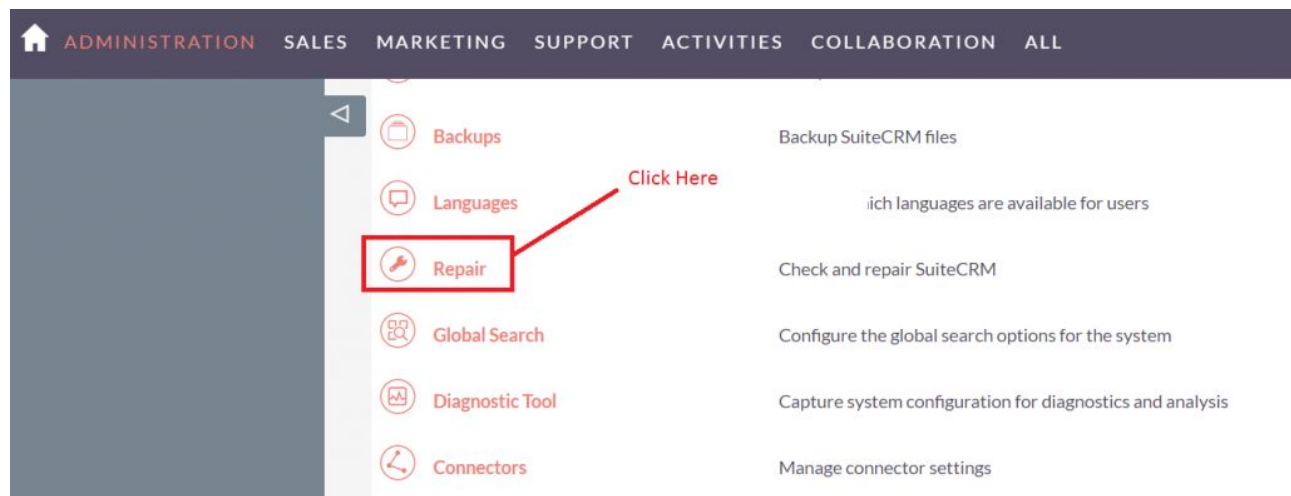
| Name  | Action | Enable/Disable | Type   | Version | Date Installed   | Description  |
|---|--------|----------------|--------|---------|------------------|--|
| Outright systems Core Package for all products! |        |                | module | 10      | 04/11/2019 05:35 | More info at <a href="https://www.outrightsystems.com">https://www.outrightsystems.com</a> |

Click here to install the Record Receiver Functionality

Module:  No file chosen

| Name                     | Install                                | Delete  | Type   | Version | Date Published      | Uninstallable | Description                     |
|--------------------------|--|---|--------|---------|---------------------|---------------|---------------------------------|
| Outright_Record_Receiver | <input type="button" value="INSTALL"/> | <input type="button" value="DELETE PACKAGE"/> | Module | 11      | 2019-01-10 16:25:50 | Yes           | Installs outright Record Review |

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



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

The following script will sync the database structure with the structure defined in the vendors. You have the option of using external database management tools, or to allow the administration module to run the script.

**NOTE:** any changes you make to the script in the textbox will be reflected in the exported or executed code.

```
/* Table : outr_fields_mapper */
/* MISSING TABLE: outr_fields_mapper */
CREATE TABLE outr_fields_mapper (id char(36) NOT NULL ,name varchar(255) NULL
,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id char(36)
NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0' NULL
,assigned_user_id char(36) NULL ,field_mapper_name varchar(255) NULL , PRIMARY KEY
(id)) CHARACTER SET utf8 COLLATE utf8_general_ci;
/* Table : outr_record_reciever_logger */
/* MISSING TABLE: outr_record_reciever_logger */
CREATE TABLE outr_record_reciever_logger (id char(36) NOT NULL ,name varchar(255)
NULL ,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id
char(36) NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0'
NULL ,assigned_user_id char(36) NULL , PRIMARY KEY (id)) CHARACTER SET utf8
COLLATE utf8_general_ci;
/* Table : outr_record_receiver */
/* MISSING TABLE: outr_record_receiver */
CREATE TABLE outr_record_receiver (id char(36) NOT NULL ,name varchar(255) NULL
,date_entered datetime NULL ,date_modified datetime NULL ,modified_user_id char(36)
NULL ,created_by char(36) NULL ,description text NULL ,deleted bool DEFAULT '0' NULL
,assigned_user_id char(36) NULL ,unassign bool DEFAULT '0' NULL ,to_admin bool DEFAULT
'0' NULL ,for_body_email bool NULL ,status varchar(255) NULL ,body_email_alias
varchar(255) NULL ,email_address varchar(255) NULL ,user_id_c char(36) NULL
,inboud_email_id_value varchar(255) NULL ,mapper_module varchar(255) NULL , PRIMARY
KEY (id)) CHARACTER SET utf8 COLLATE utf8_general_ci;
```

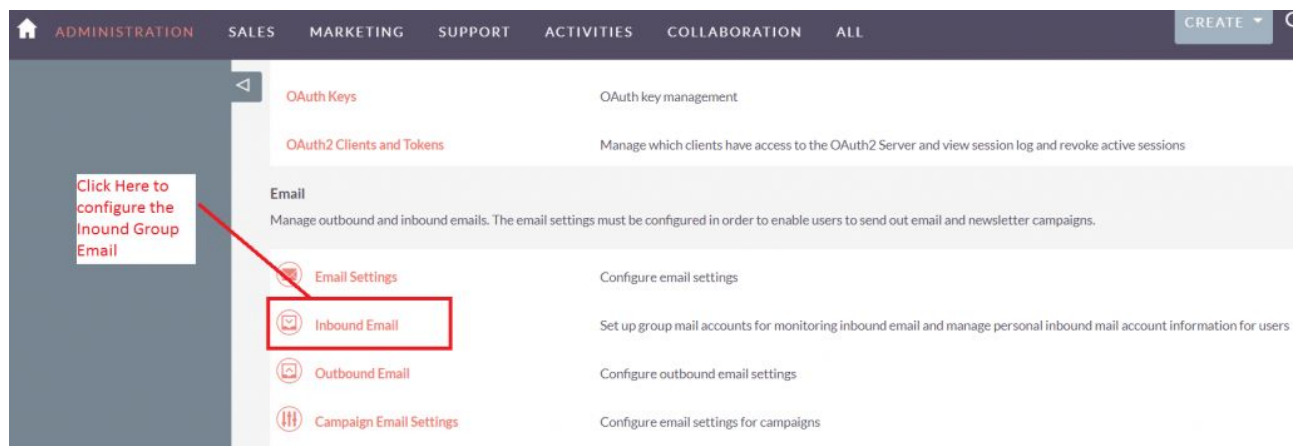
**EXECUTE** **EXPORT**

Click here to execute above query

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

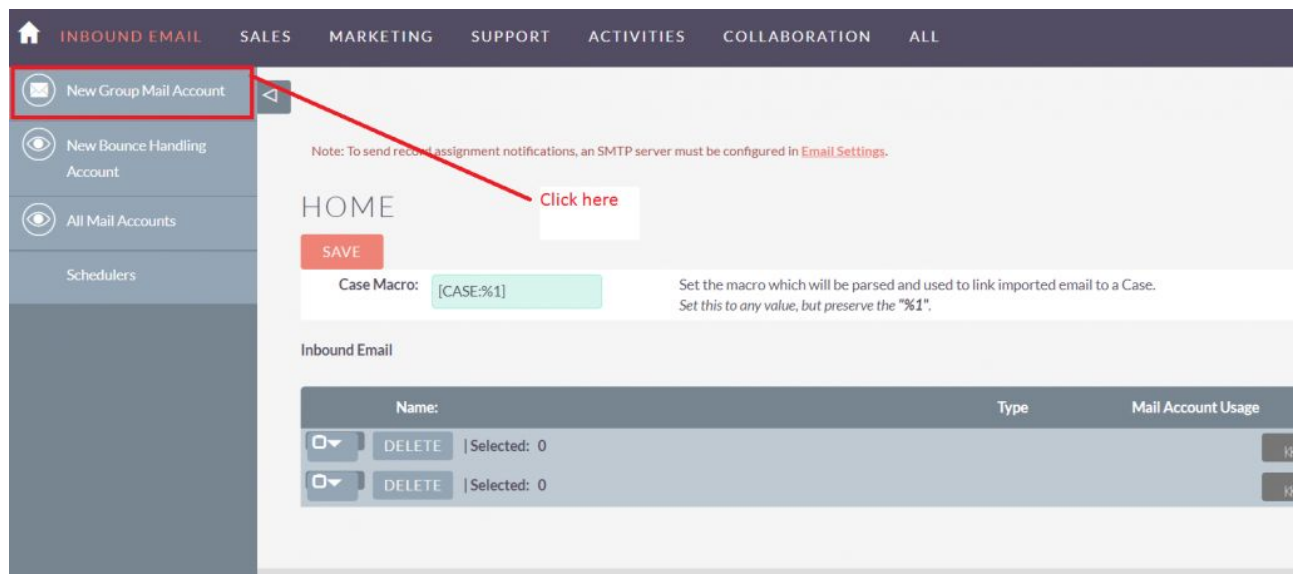
## Configuration Guide:-

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

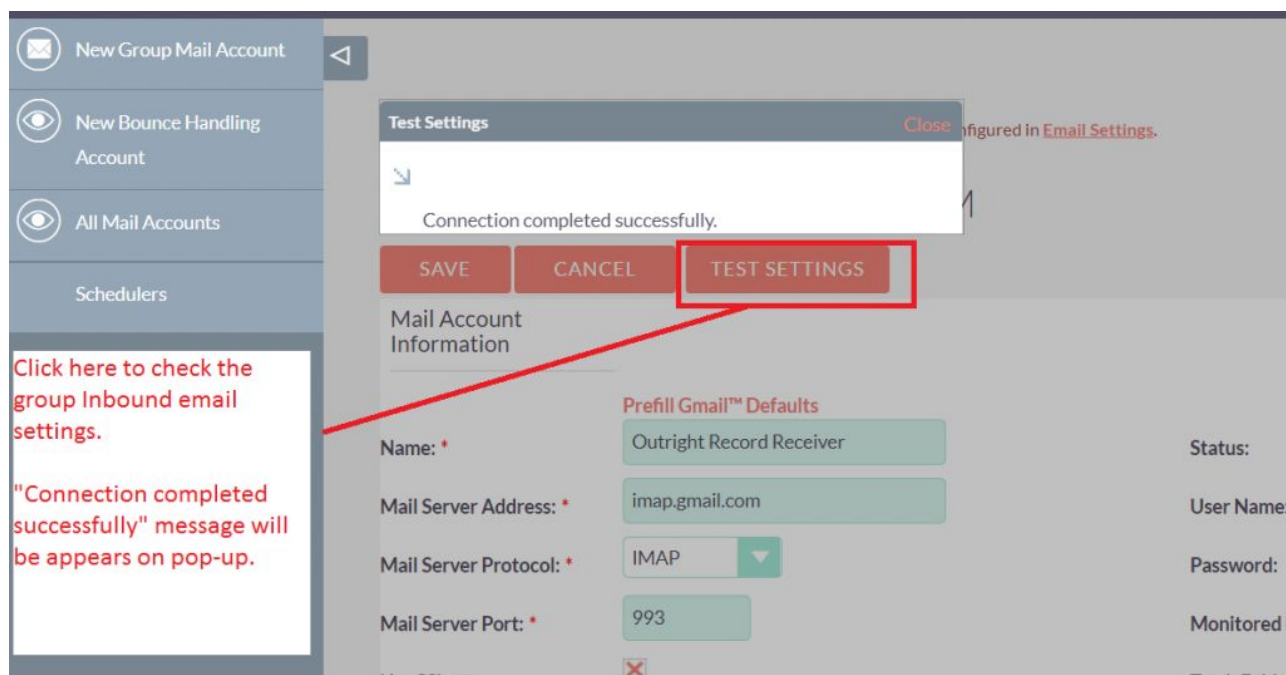




3. Click on New Group Email Account, insert the all required information and **checked Import emails Automatically.**



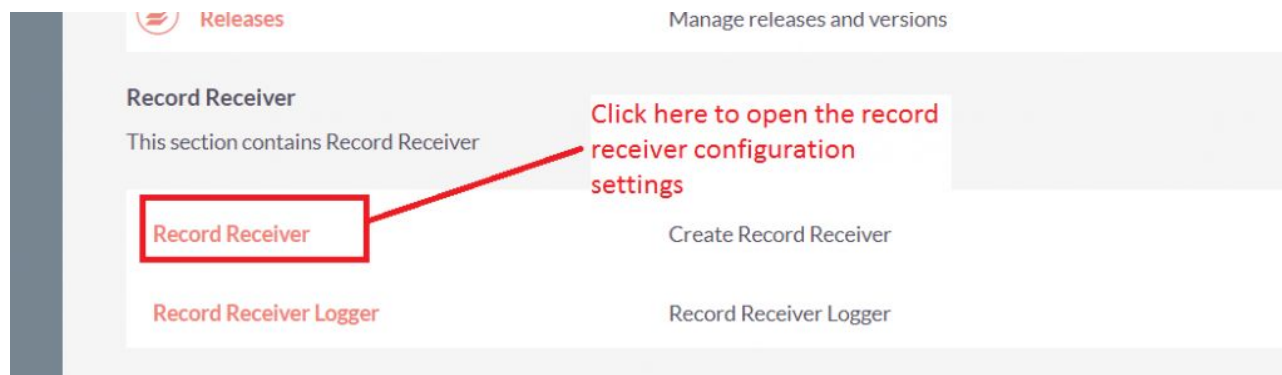
4. Click on **"Test Settings"**, observe that **"Connection completed successfully"** should appear on Pop-up.



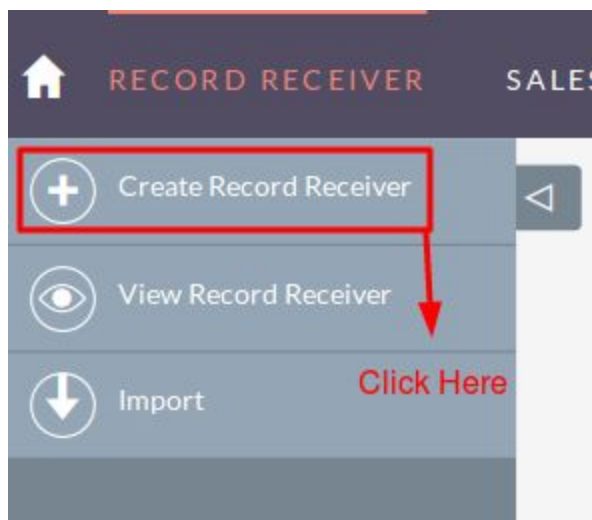
**NOTE:** after installing each plugin, It is mandatory to repair and execute.

## 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.

SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

CREATE

SAVE CANCEL

BASIC

Name:\* [text input]

Mapper Module:\* [dropdown menu]

Inbound:\* [dropdown menu]

Status: Active [dropdown menu]

Select the target module of email data parsing

Select the Inbound group email for record receiver

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

SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL CREATE Search... admin

BASIC

Name:\* [text input]

Mapper Module:\* Leads [dropdown menu]

Inbound:\* [dropdown menu]

Status: [dropdown menu]

+

-

first\_name First Name last\_name Last name

BODY EMAIL

Body Email: ☐

Body Email Mapper: [text input]

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

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.

The screenshot displays the configuration interface for SuiteCRM Record Receiver, divided into three main sections: BODY EMAIL, ASSIGNMENT RULE, and NOTIFICATION RULE.

- BODY EMAIL:** This section contains two fields. The 'Body Email' field has a checkbox that is checked, highlighted by a red box. The 'Body Email Mapper' field is a text input containing 'Email Address', also highlighted by a red box.
- ASSIGNMENT RULE:** This section contains an 'Unassigned' checkbox, which is unchecked.
- NOTIFICATION RULE:** This section is partially visible at the bottom.

Red arrows point from the 'Body Email' checkbox and the 'Body Email Mapper' field to a red text box that reads: 'Checked the body email for body email receiver and set the token for 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.

The screenshot displays the SuiteCRM Record Receiver interface. At the top, there is a navigation bar with tabs for SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. A 'CREATE' button is visible on the right. Below the navigation bar, the 'Mapper Module' is set to 'Body Email' and the 'Status' is 'Active'. The 'BODY EMAIL' section includes a 'Body Email' checkbox and a 'Body Email Mapper' field. The 'ASSIGNMENT RULE' section is highlighted with a red box and a red arrow pointing to it with the text 'Set the assingment rule of newly created lead'. This section contains an 'Unassigned' checkbox and an 'Assigned to' field with a red 'X' button. The 'NOTIFICATION RULE' section includes an 'Admin' checkbox and an 'Email Address' field. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

Mapper Module:  Status: Active

**BODY EMAIL**

Body Email: ☐ Body Email Mapper:

**ASSIGNMENT RULE**

Unassigned: ☐ Assigned to:

**NOTIFICATION RULE**

Admin: ☐ Email Address:

SAVE CANCEL

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

ASSIGNMENT RULE

Unassigned: ☐

Assigned to:  ✕

Checked for admin notify

NOTIFICATION RULE

Admin: ☐

Email Address:

SAVE CANCEL

## 9. Click on save after configuring all settings.

SAVE CANCEL Click Here

BASIC

Name:  Inbound email:

Mapper Module:  Status:

+ - first\_name Fname - last\_name Lname

- description Description - phone\_mobile Mobile

BODY EMAIL

Body Email: ✕ Body Email Mapper:

ASSIGNMENT RULE

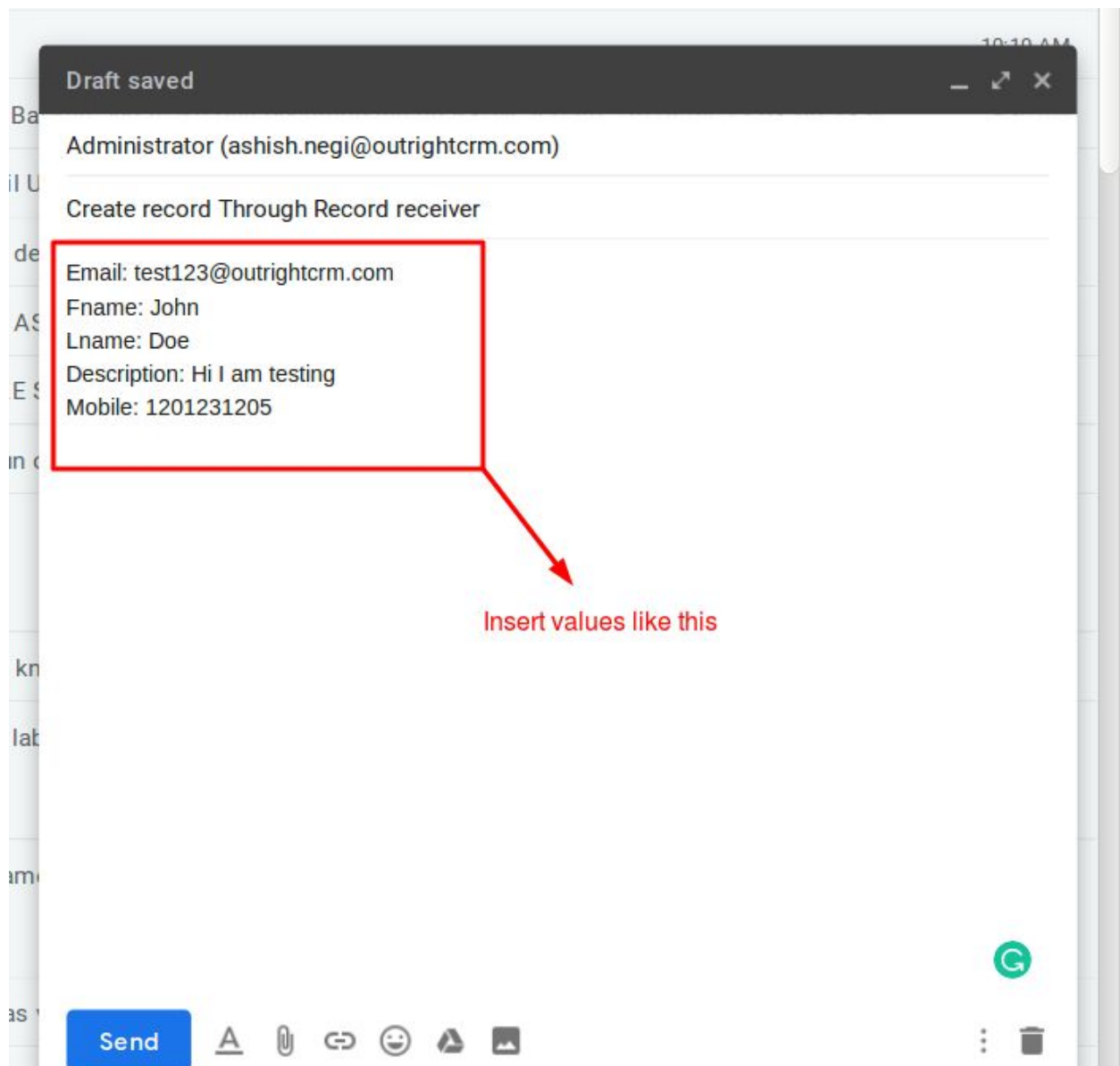
Unassigned: ✕ Assigned to:  ✕

NOTIFICATION RULE

Admin: ✕ Email Address:

SAVE CANCEL

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

BASIC

ACTIONS

PREVIOUS

(10 of 14)

NEXT

Job Name:

Check Inbound Mailboxes

Date & Time Start:

01/01/2015 17:00

Date & Time End:

Last Successful Run:

04/12/2019 15:38

Execute If Missed:

☐

Date Created:

04/10/2019 16:39 by admin

Status:

Active

Active From:

Always

Active To:

Always

Interval:

As often as possible.

Job:

function::pollMonitoredInboxesAOP

Date Modified:

04/10/2019 16:39 by admin

JOB LOG

| Job Name                | Job Status | Execute Time     | Date Modified    |
|-------------------------|------------|------------------|------------------|
| Check Inbound Mailboxes | done       | 04/12/2019 15:38 | 04/12/2019 15:38 |
| Check Inbound Mailboxes | done       | 04/12/2019 15:37 | 04/12/2019 15:37 |
| Check Inbound Mailboxes | done       | 04/12/2019 15:36 | 04/12/2019 15:36 |

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

The screenshot displays the SuiteCRM interface. The top navigation bar includes tabs for LEADS, SALES, MARKETING, SUPPORT, ACTIVITIES, COLLABORATION, and ALL. A 'CREATE' button is visible on the right. The left sidebar contains a 'Create Lead' button and a 'Recently Viewed' list with entries for John Doe, Check Inbound..., test, and two other John entries. The main content area shows the profile for 'JOHN DOE' with a star icon. Below the name are tabs for OVERVIEW, MORE INFORMATION, OTHER, and ACTIONS. The form fields are organized into two columns. The left column includes Name (John Doe), Title, Department, Account Name, Primary Address, Email Address (test123@outrightcrm.com (Primary)), Description (Hi I am testing), and Assigned to (admin). The right column includes Office Phone, Mobile (1201231205), Fax, Website (http://), and Other Address.

|                  |                                   |                |            |
|------------------|-----------------------------------|----------------|------------|
| Name:            | John Doe                          | Office Phone:  |            |
| Title:           |                                   | Mobile:        | 1201231205 |
| Department:      |                                   | Fax:           |            |
| Account Name:    |                                   | Website:       | http://    |
| Primary Address: |                                   | Other Address: |            |
| Email Address:   | test123@outrightcrm.com (Primary) |                |            |
| Description:     | Hi I am testing                   |                |            |
| Assigned to:     | admin                             |                |            |

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