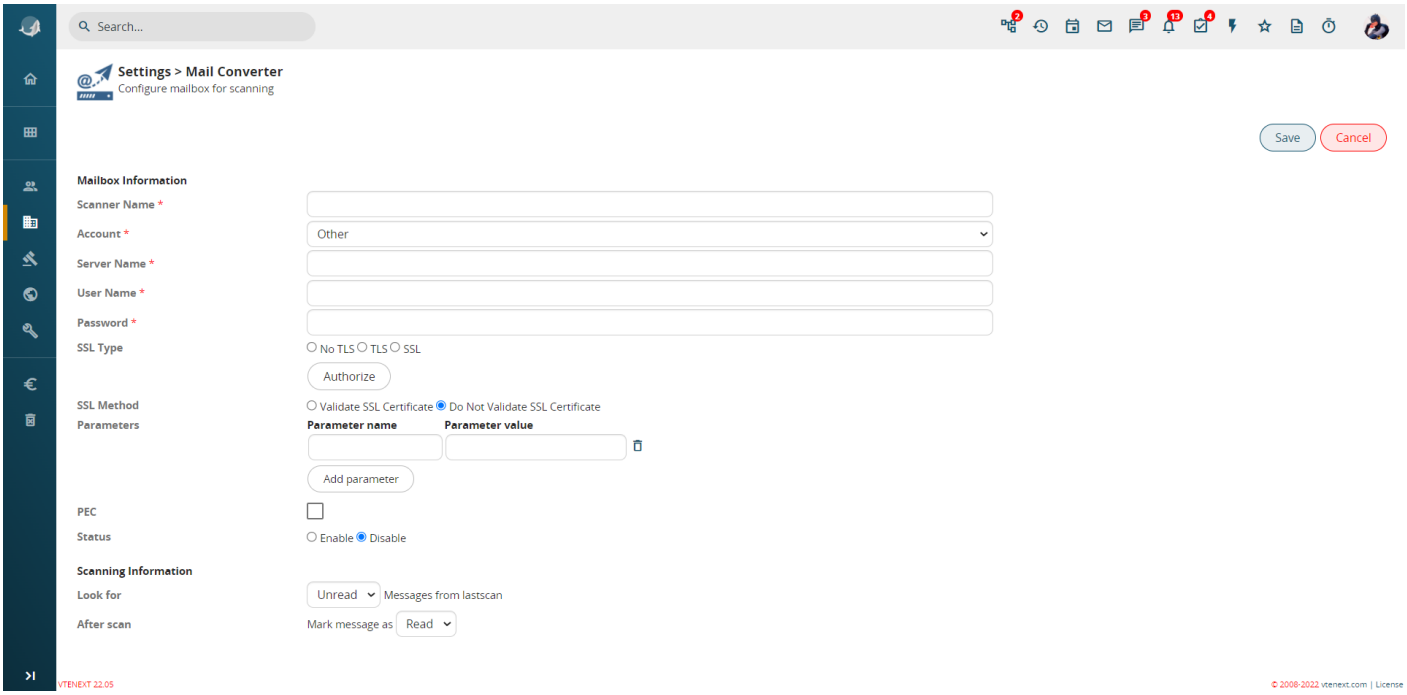
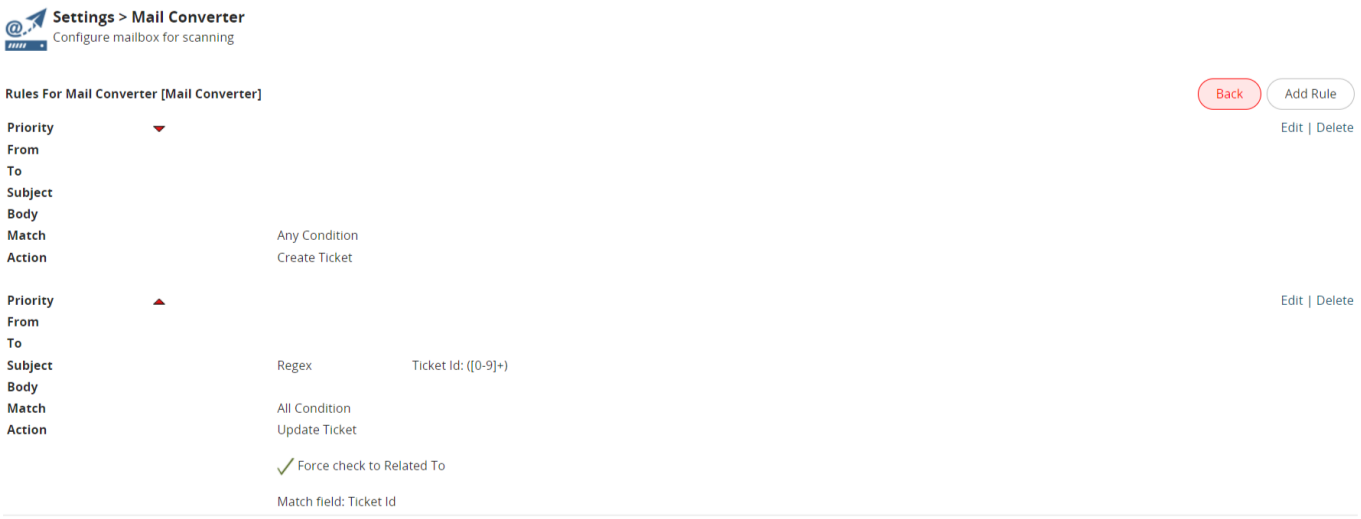
17.15 Mail Converter

The Mail Converter is a tool that allows you to read one or more mailboxes and, when a condition occurs on an email, to activate automatic operations such as archiving the email, linking it to a registry entity, or transforming the email into a Ticket in the HelpDesk module. From vtenext 20.04 it is possible to configure in the mail scanner function also certified mailboxes (PEC).



Enter your new mailbox data.



N.B.: if you want the Mail Converter to update the same ticket each time, linking the replies that arrive via email from the client, you need to insert the "Regex" variable in the subject line and both

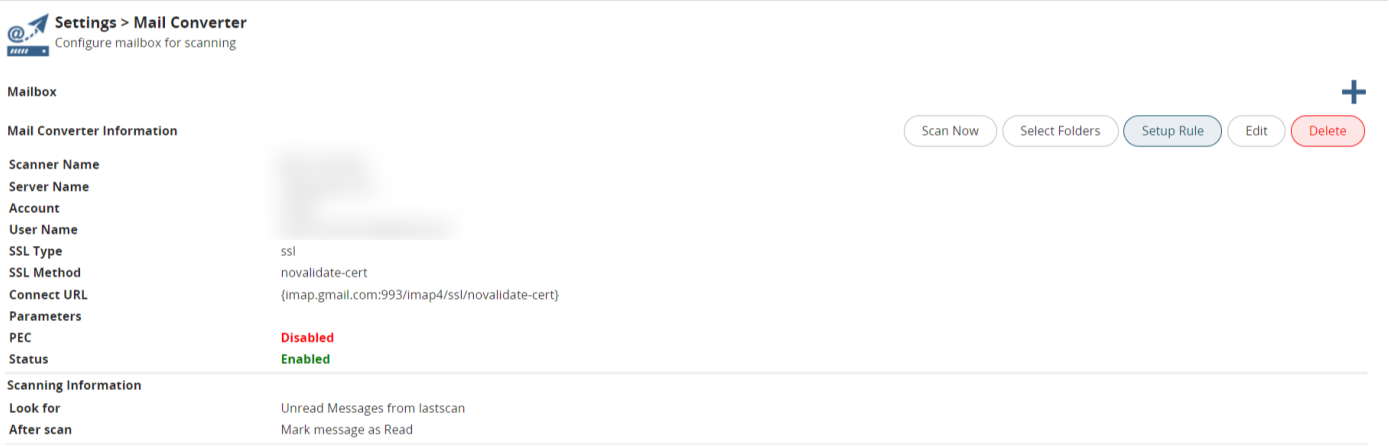
the "Update ticket" variable and the "Ticket ID" Comparison Key as an action(see image). Regex must be in first position, so that the CRM checks if a Ticket with that title already exists, in which case it updates it, or, if it is not present, creates a new one.

Scanner Nome	Indicate the name, as preferred, to be given to the scanner
Server Nome	Enter the address of the IMAP mail server, for example: mail.dominiocompany.it
Protocol	Indicate IMAP4 or IMAP2
User Name	Enter the User Name to access the inbox; it usually matches the email address
Password	Enter the inbox access password
SSL Type, SSL Method	Indicate the access security protocol information if required
Parameters	It is used to configure advanced parameters for the imap connection, without using the code. Example: • Parameter name: DISABLE_AUTHENTICATOR • Parameter value: PLAIN
PEC	Indicate that the current email address is a PEC By enabling the flag. In this way the ticket will be created using the original email, that is the one contained in the attatched .eml file.
Status	Enable = mailbox scan is active; Disable = mailbox scan is not active
Find	Indicate if: • All = all emails after the last scan • Not read = only emails not read after last scan
After Scanning	Allows you to indicate whether to change the status of the email after scanning: • Empty = does not change the status • Read = the email is marked as read

Warning! The mailbox must be accessible in IMAP mode; you cannot configure access in POP3 mode.

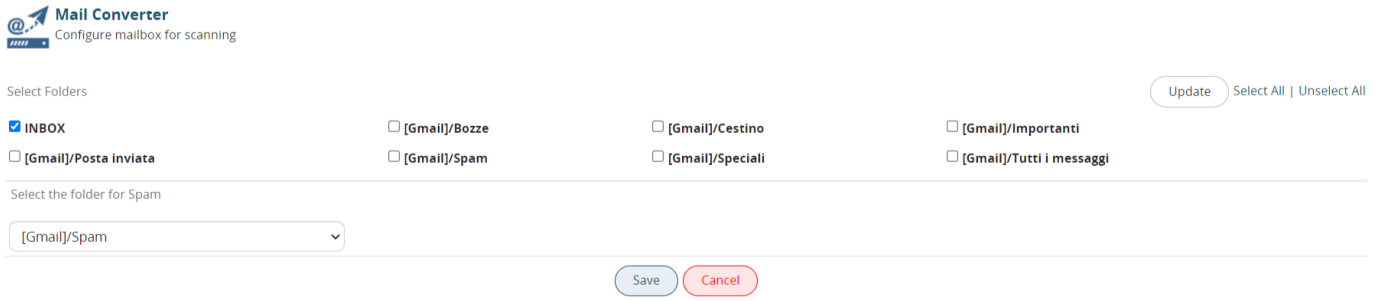
After saving the mailbox data you can:

- Decide which folders in your inbox will be read, using the Select Folders button
- Configure the rules of the Mail Converter, using the Setup Rule button
- Manually launch the scan of the box, using the Scan Now button



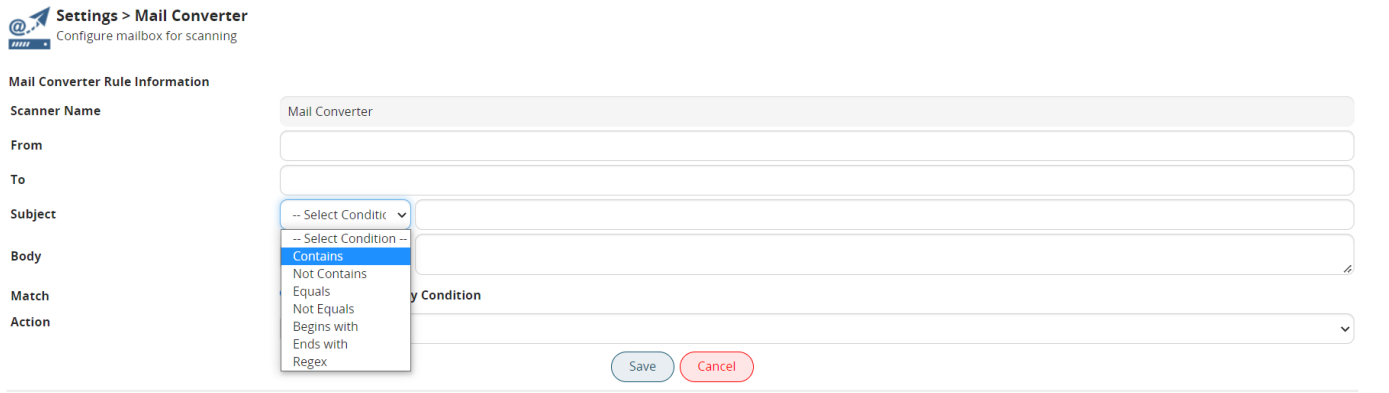
Select Folders

Activate the flag at the folder to be scanned.



Setup Rule

Through the Setup Rule button, you can configure the actions to be taken after the email check. Click the Add Rule button on the right and then set the rule:



From	Indicate a condition in the From field: (sender), if not present leave the field blank

To	Indicate a condition in the To field: (recipient), if not present leave the field blank
Subject	Indicate a condition in the Object field, if not present leave the field blank
Body	Indicate a condition in the body of the email, if not present leave the field blank
Match	Indicate: • Any Condition: at least one condition must be true (OR) • All conditions: all conditions must be true (AND)
Action	Indicate the action to be taken when conditions occur. • Create a ticket: Create a ticket from an email, with the following features: • Connected to: the Contact is inserted on the basis of the sender's email address; if not present it remains empty • Title: subject matter of the email • Description: body of the email • Documents: any attachments to the email • Update Ticket: update an existing ticket • Add TO/ FROM: file the email by linking it to the Lead/Account/Contact registry with a check on the email address of the sender [FROM] or the recipient [TO] of the mail

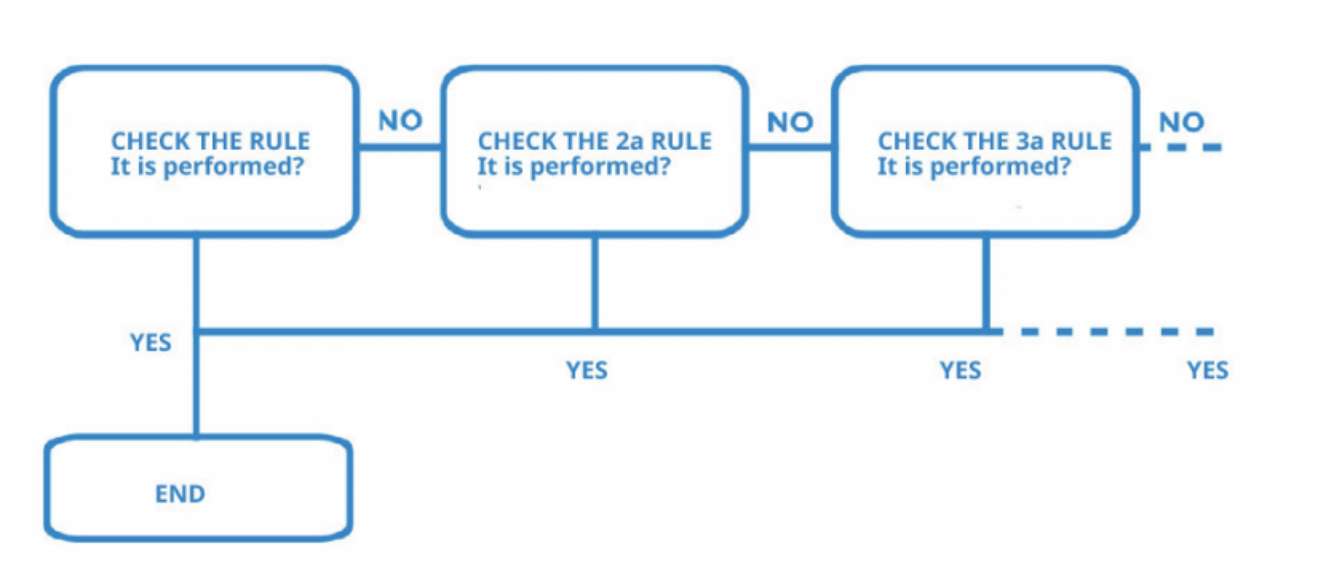
You can set multiple rules and define priorities using the arrows.

Settings > Mail Converter
Configure mailbox for scanning

Rules For Mail Converter [Email da Esami]

Priority		
From		
To		
Subject	Regex	Ticket Id: ([0-9]+)
Body		
Match	All Condition	
Action	Update Ticket	
	✓ Force check to Related To	
	Match field: Ticket Id	
Priority		
From		
To		
Subject		
Body		
Match	Any Condition	
Action	Create Ticket	

Logic:



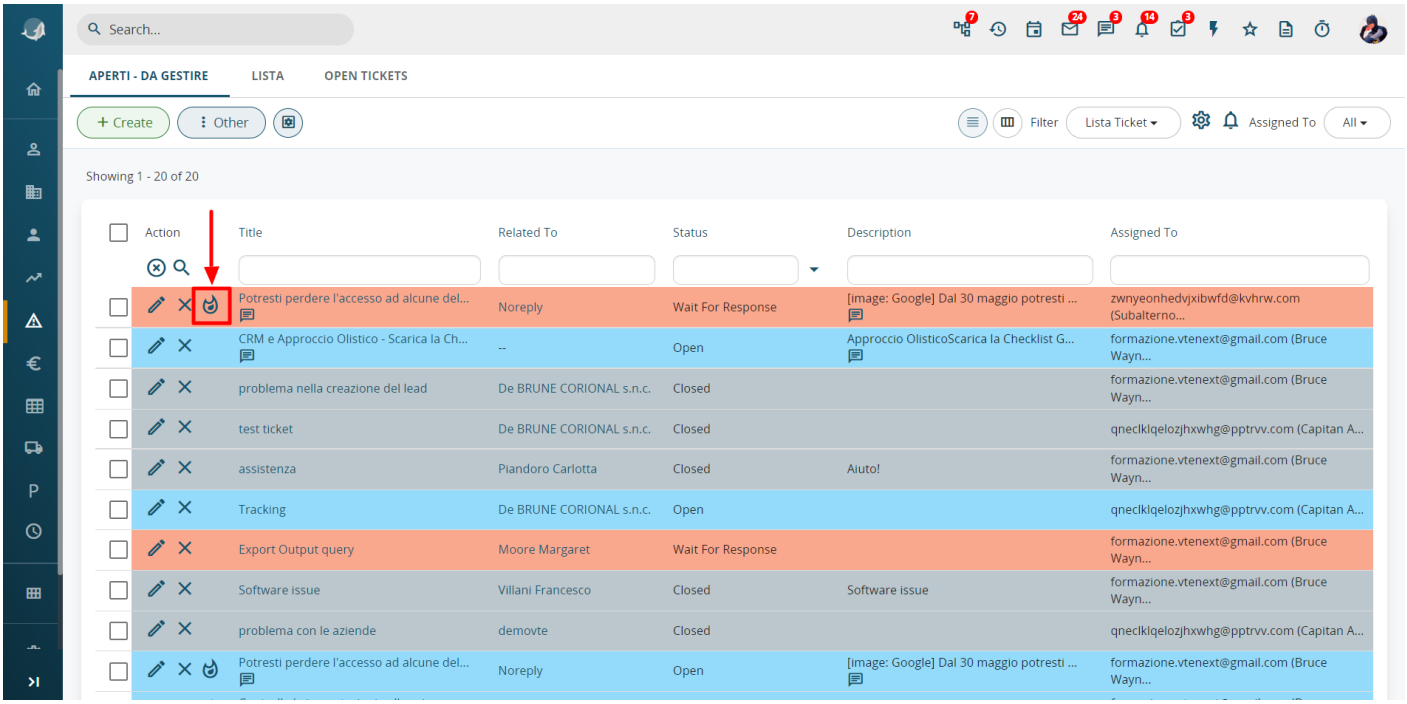
Scan Now

You can manually launch the scan box by clicking the Scan Now button.

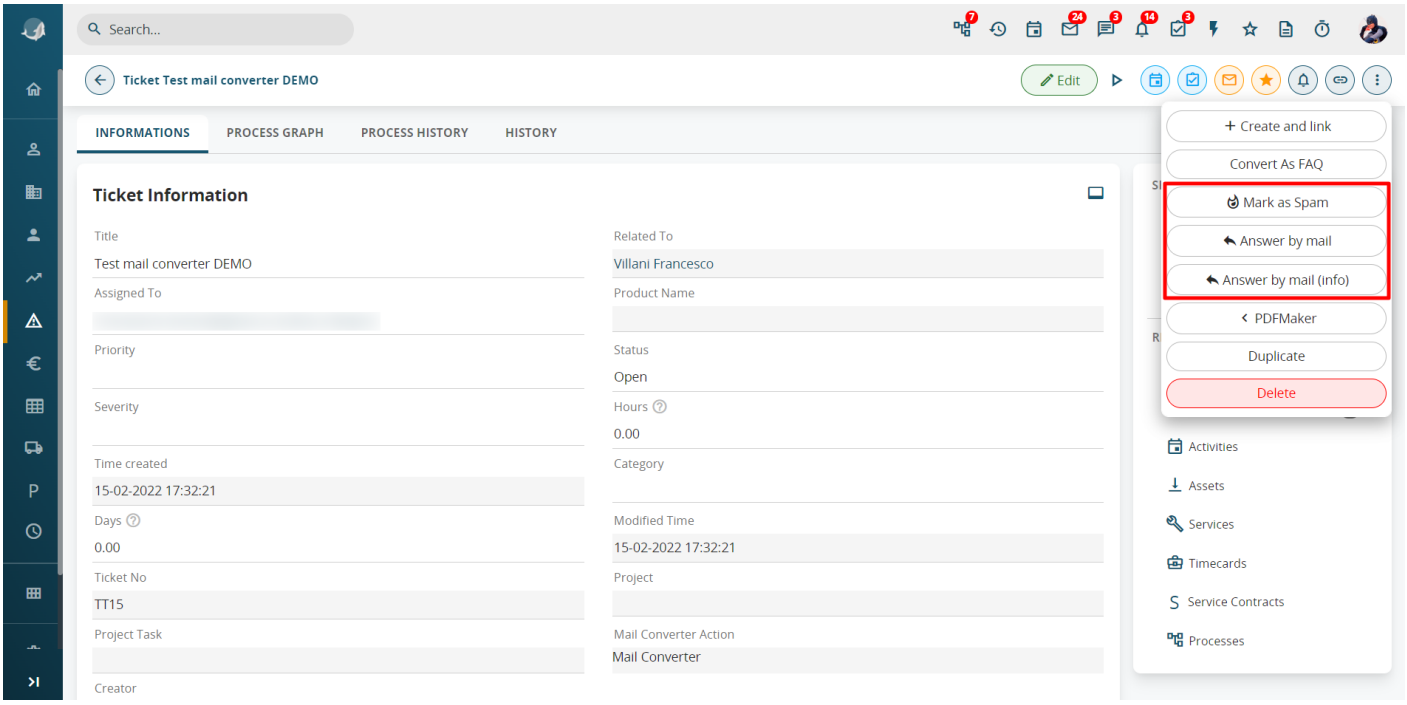
Warning! To activate the automatic check, you need to activate a job in the vtenext server. See the CRONJOB -- Processes to plan chapter.

What happens to the Trouble Tickets module?

At this point all the incoming emails of the preconfigured box for the Mail Converter, will go directly in the Trouble Tickets module. Note that the tickets created in this way are distinguished from those created directly in the CRM by the small flame icon, which allows us to mark that specific email as "spam" and consequently eliminate the ticket.



When we have to answer to one of those email the procedure is simple.
In the button “Other”, present at the top right of each ticket record, there will be 3 new buttons:

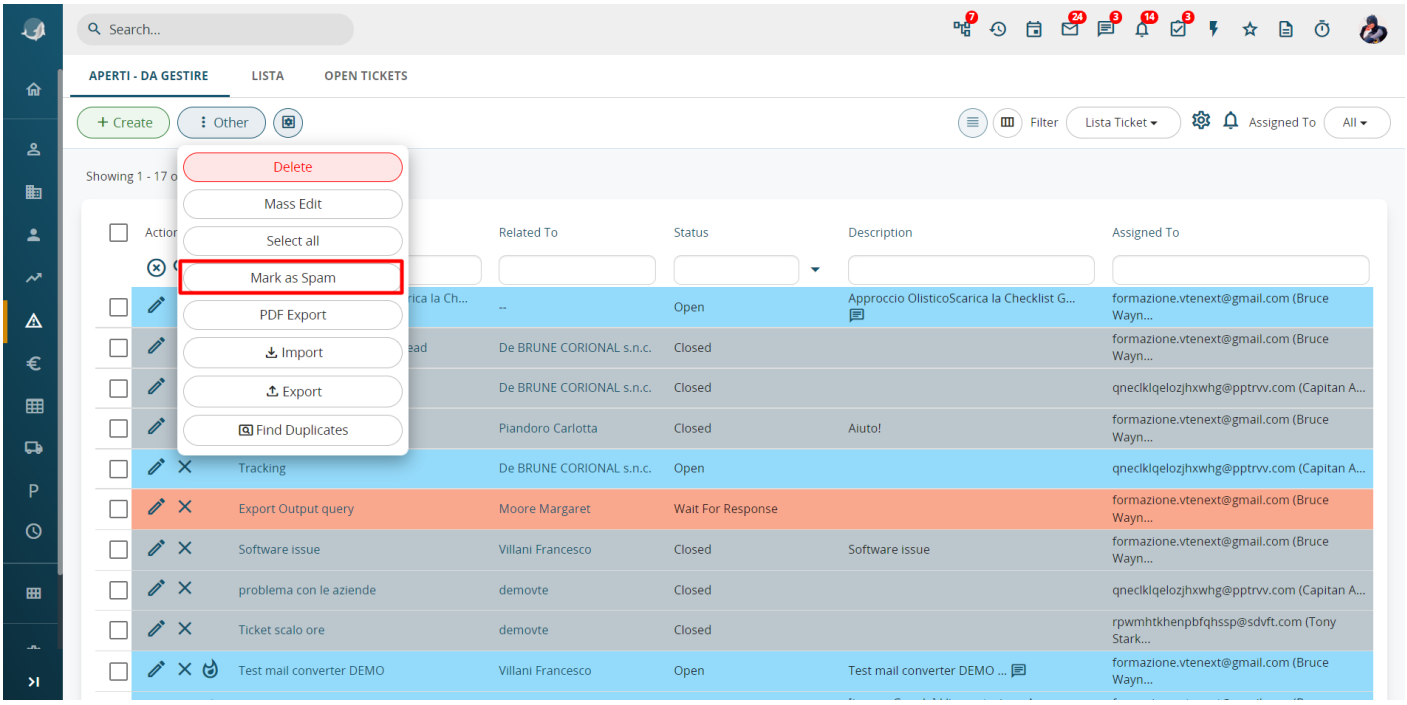


Mark as Spam	In this way the email address of the sender will be put in spam. Furthermore, the ticket will be delated.
Answer by mail	It allows to reply to the email with the email address of the user that is carrying out that operation and not with the email set in the Mail Converter.
Answer by Mail (Info)	It allows to reply to the customer directly with the email address set in the Mail Converter. In this way, we will be able to track the exchange of communications in the ticket.

It's possible to reply to a ticket through the comments system, the crm will send the reply via email exactly as it would by clicking on the "Reply via Mail (Info)" button (only for tickets generated by the Mail Converter).

N.B.: if you reply to the ticket with the "Reply via Mail" function, you exit from Mail Converter system. The question and answer will therefore be managed, in a personal way, between the customer's email address and the user's email address.

There is another way to massively mark as spam a group of emails (tickets). Go to the list view, tick the ticets you want to mark as spam, click on the button “Other”, and chose **“Mark as spam”** .



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