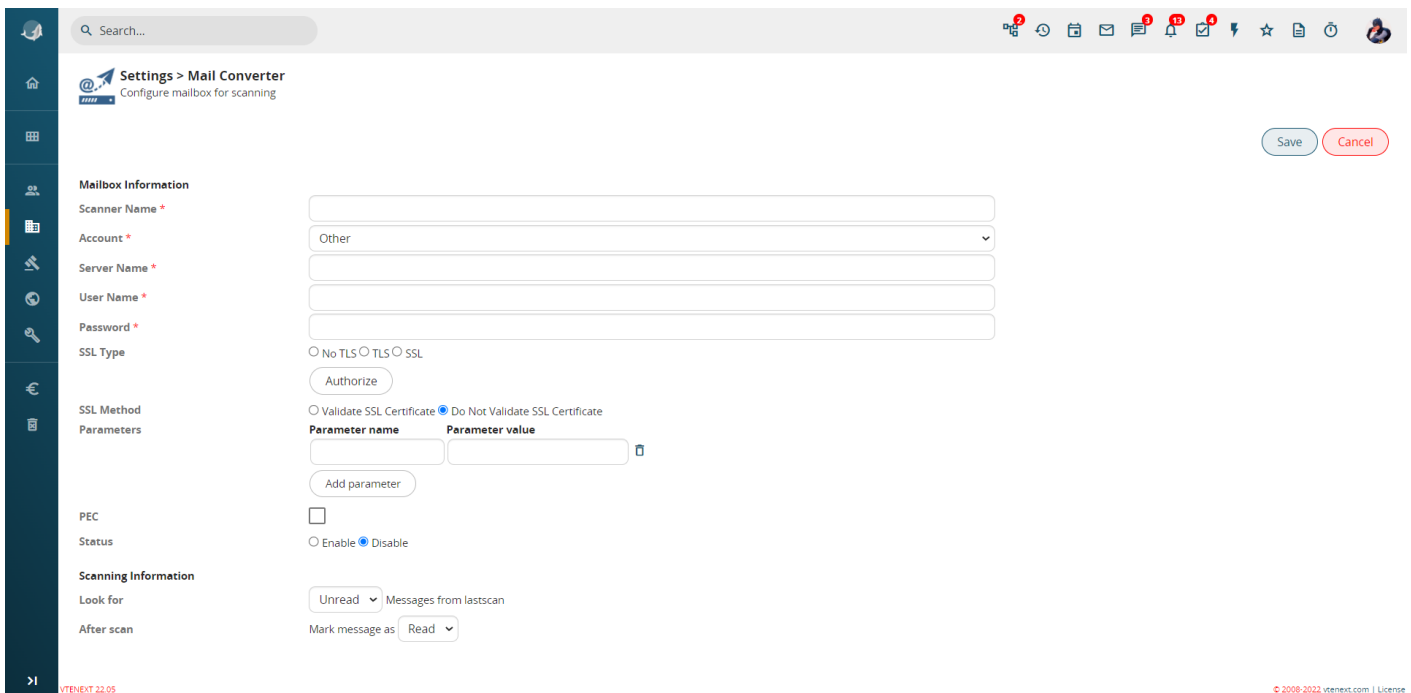


# 17.15 Mail Converter

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). Starting from version 22.05.1, it is possible to use two-factor authentication (OAuth2) for Office365 mailboxes.

**Warning:** Starting from version 24.xx, for all new installations or updated installations that do NOT yet have the Mail Converter configured, it is possible to trigger a process from the creation/update of a ticket. If a version of vtenext has been updated to 24.xx and there are already configurations on the Mail Converter, please open a ticket with vtenext technical support to enable this update function from the process.



The screenshot shows the 'Settings > Mail Converter' configuration page in the vtenext application. The page has a dark blue sidebar on the left with various icons. The main content area is white and contains several sections for configuration:

- Mailbox Information:** Includes fields for 'Scanner Name \*', 'Account \*' (with a dropdown menu showing 'Other'), 'Server Name \*', 'User Name \*', and 'Password \*'. Below these is the 'SSL Type' section with radio buttons for 'No TLS', 'TLS', and 'SSL', and an 'Authorize' button.
- SSL Method:** Includes radio buttons for 'Validate SSL Certificate' and 'Do Not Validate SSL Certificate' (which is selected).
- Parameters:** A table with two columns: 'Parameter name' and 'Parameter value'. There is an 'Add parameter' button below the table.
- PEC:** A checkbox that is currently unchecked.
- Status:** Radio buttons for 'Enable' and 'Disable' (which is selected).
- Scanning Information:** Includes a 'Look for' dropdown menu (set to 'Unread') and a 'Mark message as' dropdown menu (set to 'Read').

At the top right of the main content area, there are 'Save' and 'Cancel' buttons. The bottom of the page shows the vtenext logo and version '22.05' on the left, and a copyright notice '© 2008-2022 vtenext.com | License' on the right.

Enter your new mailbox data.

Rules For Mail Converter [Mail Converter]

Back

Add Rule

Edit | Delete

Priority



From

To

Subject

Body

Match

Action

Any Condition

Create Ticket

Priority



From

To

Subject

Body

Match

Action

Regex

Ticket Id: {[0-9]\*}

All Condition

Update Ticket

✓ Force check to Related To

Match field: Ticket Id

Edit | Delete

**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.


<b>Scanner Nome</b>	Indicate the name, as preferred, to be given to the scanner
<b>Server Nome</b>	Enter the address of the IMAP mail server, for example: mail.dominiocompany.it
<b>Protocol</b>	Indicate IMAP4 or IMAP2
<b>User Name</b>	Enter the User Name to access the inbox; it usually matches the email address
<b>Password</b>	Enter the inbox access password
<b>SSL Type, SSL Method</b>	Indicate the access security protocol information if required
<b>Parameters</b>	<p>It is used to configure advanced parameters for the imap connection, without using the code. Example:</p> <ul style="list-style-type: none"> <li>Parameter name: DISABLE_AUTHENTICATOR</li> <li>Parameter value: PLAIN</li> </ul>

<b>PEC</b>	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 attached .eml file.
<b>Status</b>	Enable = mailbox scan is active; Disable = mailbox scan is not active
<b>Find</b>	Indicate if: <ul style="list-style-type: none"> <li>• All = all emails after the last scan</li> <li>• Not read = only emails not read after last scan</li> </ul>
<b>After Scanning</b>	Allows you to indicate whether to change the status of the email after scanning: <ul style="list-style-type: none"> <li>• Empty = does not change the status</li> <li>• Read = the email is marked as read</li> </ul>

**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


**Settings > Mail Converter**  
Configure mailbox for scanning

Mailbox

Mail Converter Information

Scanner Name

Server Name

Account

User Name

SSL Type

SSL Method

Connect URL

Parameters

PEC

Status

ssl

novalidate-cert

{imap.gmail.com:993/imap4/ssl/novalidate-cert}

Disabled

Enabled

Scanning Information

Look for

After scan

Unread Messages from lastscan

Mark message as Read

Scan Now

Select Folders

Setup Rule

Edit

Delete

+

## Select Folders

Activate the flag at the folder to be scanned.

Select Folders

☒ INBOX
 ☐ [Gmail]/Posta inviata

☐ [Gmail]/Bozze
 ☐ [Gmail]/Spam

☐ [Gmail]/Cestino
 ☐ [Gmail]/Speciali

☐ [Gmail]/Importanti
 ☐ [Gmail]/Tutti i messaggi

Select the folder for Spam


[Gmail]/Spam

Save

Cancel

## 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:


**Settings > Mail Converter**  
 Configure mailbox for scanning

Mail Converter Rule Information

Scanner Name
 

Mail Converter

From

To

Subject
 

-- Select Condition --

Contains

Not Contains

Equals

Not Equals

Begins with

Ends with

Regex

Body

Match
 

Any Condition

Action

Save

Cancel

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: <ul style="list-style-type: none"> <li>Any Condition: at least one condition must be true (OR)</li> <li>All conditions: all conditions must be true (AND)</li> </ul>

<b>Action</b>	<p>Indicate the action to be taken when conditions occur.</p> <ul style="list-style-type: none"> <li>• Create a ticket: Create a ticket from an email, with the following features:</li> <li>• Connected to: the Contact is inserted on the basis of the sender's email address; if not present it remains empty</li> <li>• Title: subject matter of the email</li> <li>• Description: body of the email</li> <li>• Documents: any attachments to the email</li> <li>• Update Ticket: update an existing ticket</li> <li>• 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</li> </ul>
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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

Body

Match

Action



Regex

Ticket Id: ([0-9]+)

All Condition

Update Ticket

✓ Force check to Related To

Match field: Ticket Id

Priority

From

To

Subject

Body

Match

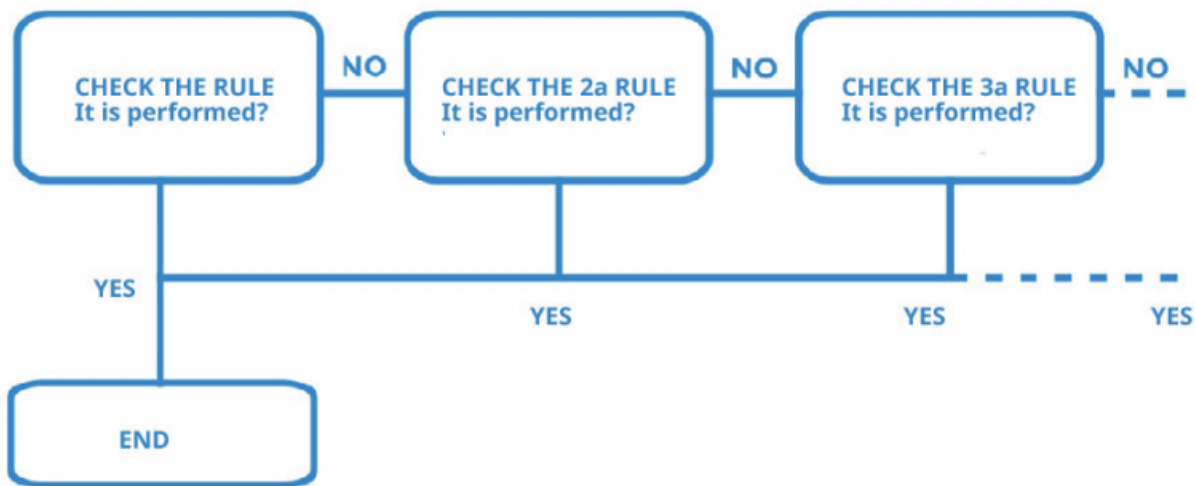
Action



Any Condition

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.

Showing 1 - 20 of 20

Action	Title	Related To	Status	Description	Assigned To
<input type="checkbox"/>	Potresti perdere l'accesso ad alcune del...	Noreply	Wait For Response	[image: Google] Dal 30 maggio potresti ...	zwnyeonhedvjxibwfd@kvhrrw.com (Subalterno...)
<input type="checkbox"/>	CRM e Approccio Olistico - Scarica la Ch...	..	Open	Approccio OlisticoScarica la Checklist G...	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	problema nella creazione del lead	De BRUNE CORIONAL s.n.c.	Closed		formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	test ticket	De BRUNE CORIONAL s.n.c.	Closed		qnecklqelozjhwxhg@pptrvv.com (Capitan A...)
<input type="checkbox"/>	assistenza	Piandoro Carlotta	Closed	Aiuto!	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	Tracking	De BRUNE CORIONAL s.n.c.	Open		qnecklqelozjhwxhg@pptrvv.com (Capitan A...)
<input type="checkbox"/>	Export Output query	Moore Margaret	Wait For Response		formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	Software issue	Villani Francesco	Closed	Software issue	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	problema con le aziende	demovte	Closed		qnecklqelozjhwxhg@pptrvv.com (Capitan A...)
<input type="checkbox"/>	Potresti perdere l'accesso ad alcune del...	Noreply	Open	[image: Google] Dal 30 maggio potresti ...	formazione.vtenext@gmail.com (Bruce Wayn...)

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:

The screenshot shows a CRM interface with a ticket record titled "Ticket Test mail converter DEMO". The ticket details include:

- Title:** Test mail converter DEMO
- Assigned To:** [User]
- Priority:** [Low]
- Severity:** [Low]
- Time created:** 15-02-2022 17:32:21
- Days:** 0.00
- Ticket No:** TT15
- Project Task:** [Task]
- Creator:** [User]
- Related To:** Villani Francesco
- Product Name:** [Product]
- Status:** Open
- Hours:** 0.00
- Category:** [Category]
- Modified Time:** 15-02-2022 17:32:21
- Project:** [Project]
- Mail Converter Action:** Mail Converter

The "Other" button menu is open, showing the following options:

- + Create and link
- Convert As FAQ
- Mark as Spam** (highlighted with a red box)
- Answer by mail
- Answer by mail (Info)** (highlighted with a red box)
- < PDFMaker
- Duplicate
- Delete
- Activities
- Assets
- Services
- Timecards
- Service Contracts
- Processes

<b>Mark as Spam</b>	In this way the email address of the sender will be put in spam. Furthermore, the ticket will be deleted.
<b>Answer by mail</b>	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.
<b>Answer by Mail (Info)</b>	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 tickets you want to mark as spam, click on the button “Other”, and chose **“Mark as spam”**.

**APERTI - DA GESTIRE**   LISTA   OPEN TICKETS

+ Create   Other   [Icon]

Showing 1 - 17 of 17 items

	Action	Related To	Status	Description	Assigned To
<input type="checkbox"/>	[Icon] [X] [Pencil]	Africa la Ch...	--	Open	Approccio Olistico Scarica la Checklist G... formazione.vtenext@gmail.com (Bruce Wayn...
<input type="checkbox"/>	[Icon] [Pencil]	lead	De BRUNE CORIONAL s.n.c.	Closed	formazione.vtenext@gmail.com (Bruce Wayn...
<input type="checkbox"/>	[Icon] [Pencil]		De BRUNE CORIONAL s.n.c.	Closed	qnecklqelozjhxwhg@pptrvv.com (Capitan A...
<input type="checkbox"/>	[Icon] [Pencil]	Piandoro Carlotta	Closed	Aiuto!	formazione.vtenext@gmail.com (Bruce Wayn...
<input type="checkbox"/>	[Icon] [X] [Pencil]	Tracking	De BRUNE CORIONAL s.n.c.	Open	qnecklqelozjhxwhg@pptrvv.com (Capitan A...
<input type="checkbox"/>	[Icon] [X] [Pencil]	Export Output query	Moore Margaret	Wait For Response	formazione.vtenext@gmail.com (Bruce Wayn...
<input type="checkbox"/>	[Icon] [X] [Pencil]	Software issue	Villani Francesco	Closed	Software Issue formazione.vtenext@gmail.com (Bruce Wayn...
<input type="checkbox"/>	[Icon] [X] [Pencil]	problema con le aziende	demovte	Closed	qnecklqelozjhxwhg@pptrvv.com (Capitan A...
<input type="checkbox"/>	[Icon] [X] [Pencil]	Ticket scalo ore	demovte	Closed	rpwmtkhenpbfqhssp@sdfvt.com (Tony Stark...
<input type="checkbox"/>	[Icon] [X] [Pencil] [Refresh]	Test mail converter DEMO	Villani Francesco	Open	Test mail converter DEMO ... formazione.vtenext@gmail.com (Bruce Wayn...

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