

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).

Settings > Mail Converter
Configure mailbox for scanning

Save Cancel

Mailbox Information

Scanner Name *

Account * Other

Server Name *

User Name *

Password *

SSL Type
 No TLS TLS SSL
Authorize

SSL Method
 Validate SSL Certificate Do Not Validate SSL Certificate

Parameters

Parameter name	Parameter value

Add parameter

PEC

Status
 Enable Disable

Scanning Information

Look for
Unread Messages from lastscan

After scan
Mark message as Read

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Enter your new mailbox data.

Settings > Mail Converter
Configure mailbox for scanning

Back Add Rule
Edit | Delete

Rules For Mail Converter [Mail Converter]

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

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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: <ul style="list-style-type: none"> • 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 attached .eml file.
Status	Enable = mailbox scan is active; Disable = mailbox scan is not active
Find	Indicate if: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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

Settings > Mail Converter
Configure mailbox for scanning

Mailbox

Mail Converter Information

Scanner Name
Server Name
Account
User Name
SSL Type: ssl
SSL Method: novaldate-cert
Connect URL: (imap.gmail.com:993/imap4/ssl/novaldate-cert)
Parameters
PEC: Disabled
Status: Enabled

Scanning Information

Look for: Unread Messages from lastscan
After scan: Mark message as Read

Scan Now | Select Folders | Setup Rule | Edit | Delete

Select Folders

Activate the flag at the folder to be scanned.

Mail Converter
Configure mailbox for scanning

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

Update | Select All | Unselect All

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 --
Body
Match
Action

Contains
Not Contains
Equals
Not Equals
Begins with
Ends with
Regex

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"> • 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. <ul style="list-style-type: none"> • 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

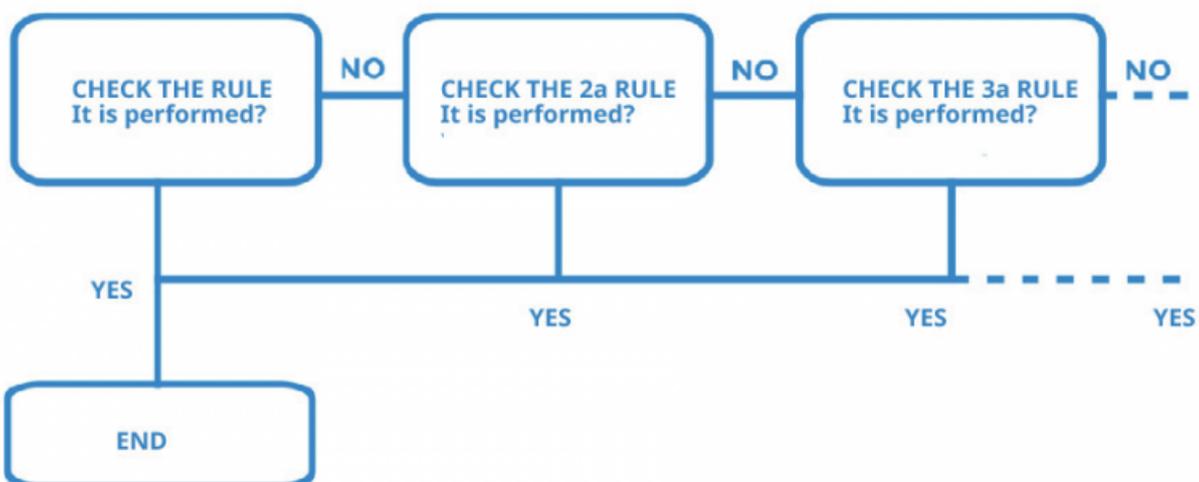
Match

Any Condition

Action

Create Ticket

Logic:



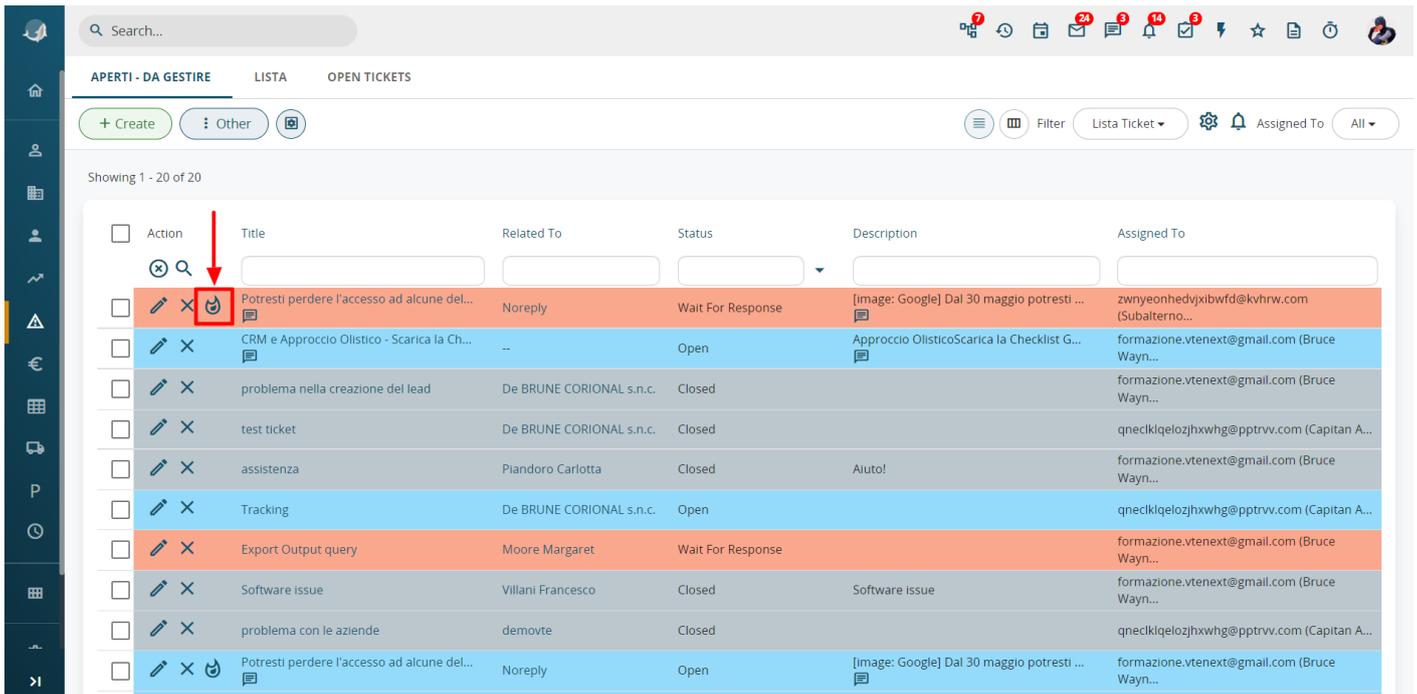
Scan Now

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.



The screenshot displays the 'APERTI - DA GESTIRE' (Open Tickets) section of a CRM interface. At the top, there is a search bar and navigation tabs for 'APERTI - DA GESTIRE', 'LISTA', and 'OPEN TICKETS'. Below the tabs are buttons for '+ Create', ': Other', and a camera icon. A filter dropdown is set to 'Lista Ticket'. The main area shows a table of tickets with columns: Action, Title, Related To, Status, Description, and Assigned To. A red arrow points to a flame icon in the 'Action' column of the first ticket row, which is highlighted in orange. The first ticket has the title 'Potresti perdere l'accesso ad alcune del...', status 'Wait For Response', and is assigned to 'zwnyeonhedvjxibwfd@kvhrrw.com (Subalterno...)'. Other tickets in the list include 'CRM e Approccio Olistico - Scarica la Ch...', 'problema nella creazione del lead', 'test ticket', 'assistenza', 'Tracking', 'Export Output query', 'Software issue', and 'problema con le aziende'.

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 detail view. The ticket title is "Ticket Test mail converter DEMO". The context menu on the right contains the following options: "+ Create and link", "Convert As FAQ", "Mark as Spam" (highlighted in red), "Answer by mail", "Answer by mail (Info)" (highlighted in red), "< PDFMaker", "Duplicate", and "Delete". Below the menu, there are sections for "Activities", "Assets", "Services", "Timecards", "Service Contracts", and "Processes".

Mark as Spam	In this way the email address of the sender will be put in spam. Furthermore, the ticket will be deleted.
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 be 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

Filter Lista Ticket Assigned To All

Showing 1 - 17 of 17 items

Action	Related To	Status	Description	Assigned To
<input type="checkbox"/>	...	Open	Approccio Olistico Scarica la Checklist G...	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	De BRUNE CORIONAL s.n.c.	Closed	...	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	De BRUNE CORIONAL s.n.c.	Closed	...	qnecklqelozjhxwhg@pptrv.com (Capitan A...)
<input type="checkbox"/>	Piandoro Carlotta	Closed	Aiuto!	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	Tracking	Open	De BRUNE CORIONAL s.n.c.	qnecklqelozjhxwhg@pptrv.com (Capitan A...)
<input type="checkbox"/>	Export Output query	Wait For Response	Moore Margaret	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	Software issue	Closed	Villani Francesco	formazione.vtenext@gmail.com (Bruce Wayn...)
<input type="checkbox"/>	problema con le aziende	Closed	demovte	qnecklqelozjhxwhg@pptrv.com (Capitan A...)
<input type="checkbox"/>	Ticket scalo ore	Closed	demovte	rpwmhtkhenpbfqhssp@sdvft.com (Tony Stark...)
<input type="checkbox"/>	Test mail converter DEMO	Open	Villani Francesco	formazione.vtenext@gmail.com (Bruce Wayn...)

Revision #1

Created 2 September 2024 07:59:11 by Admin

Updated 3 October 2024 07:58:35 by Admin