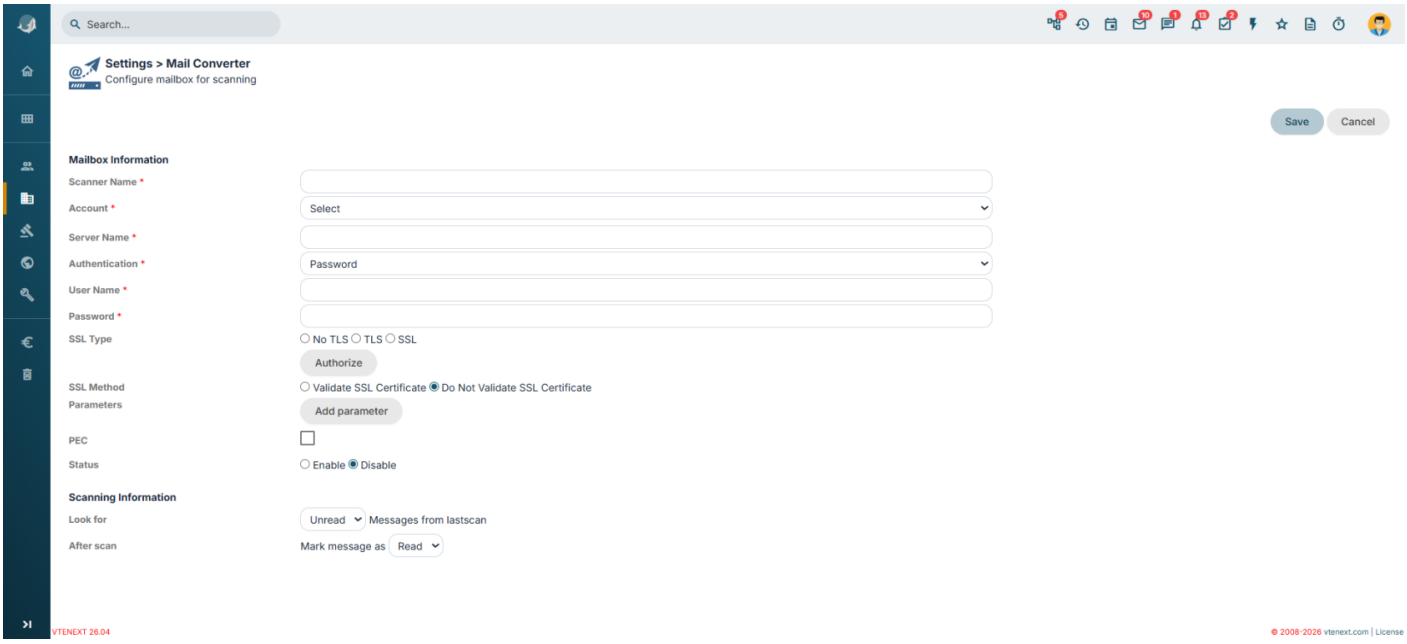
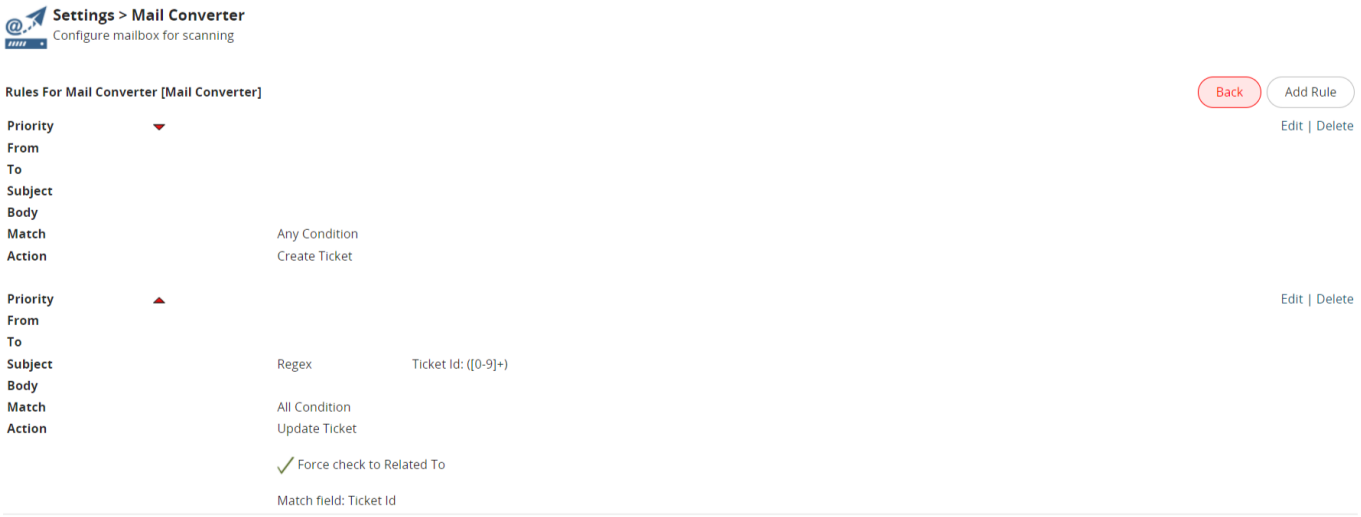
17.15 Mail Converter

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.



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.

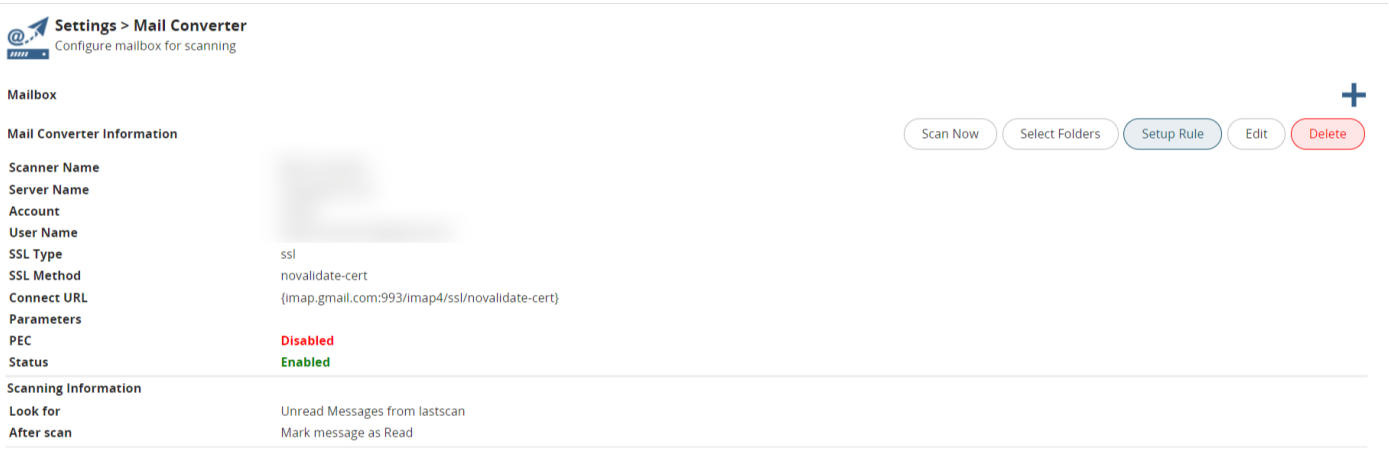
Scanner Nome	Indicate the name, as preferred, to be given to the scanner
Server Nome	Enter the address of the IMAP mail server, for example: mail.dominiocompany.it
Protocol	Indicate IMAP4 or IMAP2
User Name	Enter the User Name to access the inbox; it usually matches the email address
Password	Enter the 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.

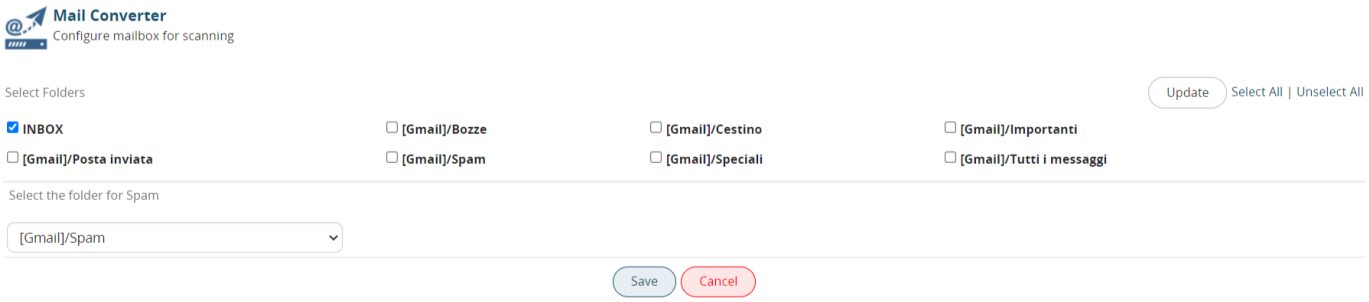
After saving the mailbox data you can:

- 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



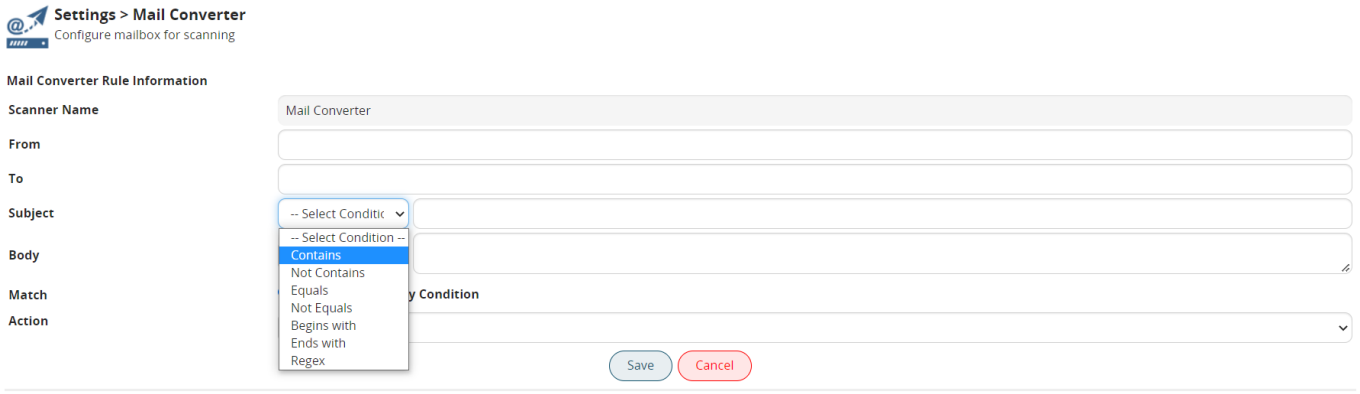
Select Folders

Activate the flag at the folder to be scanned.



Setup Rule

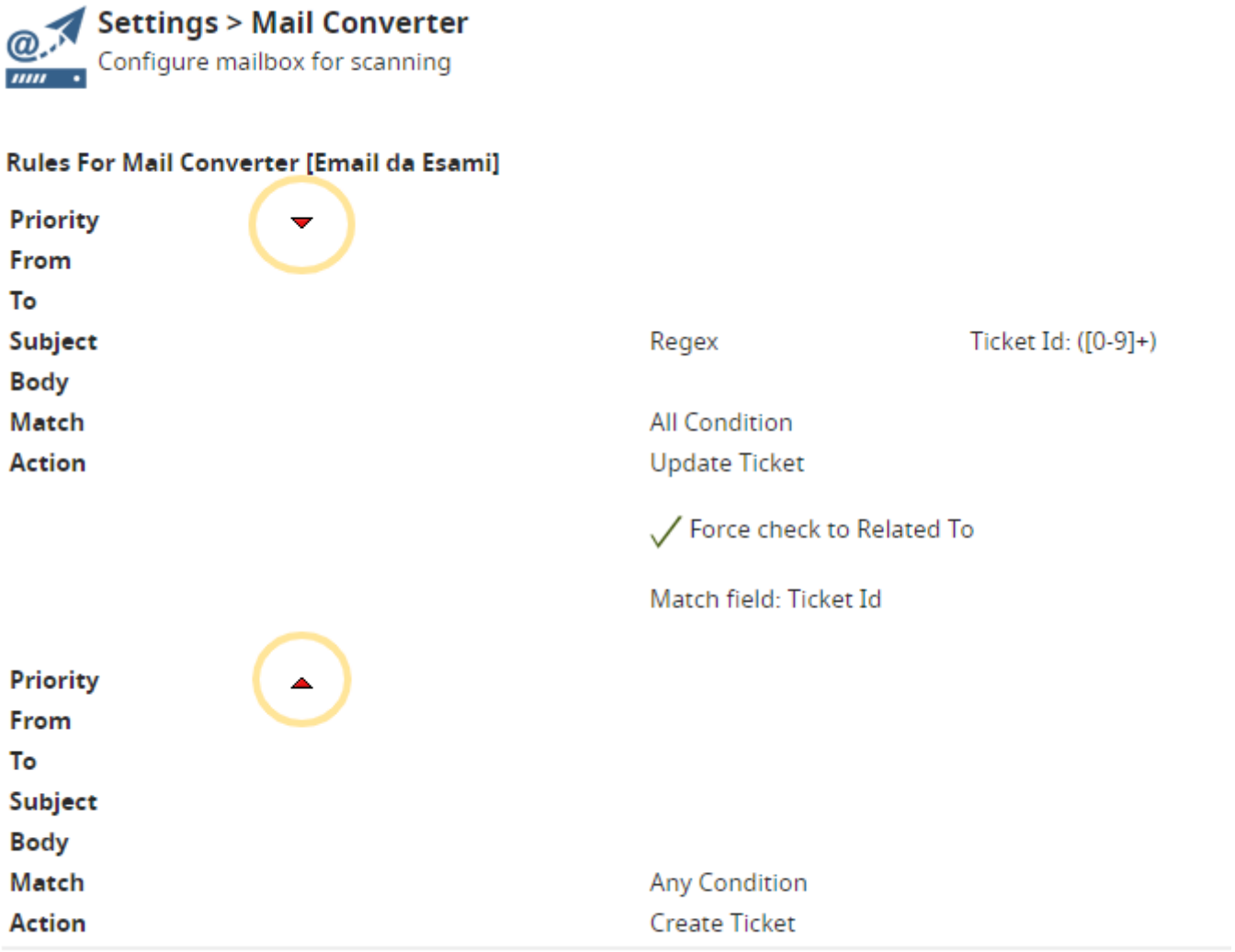
Through the Setup Rule button, you can configure the actions to be taken after the email check. Click the Add Rule button on the right and then set the rule:



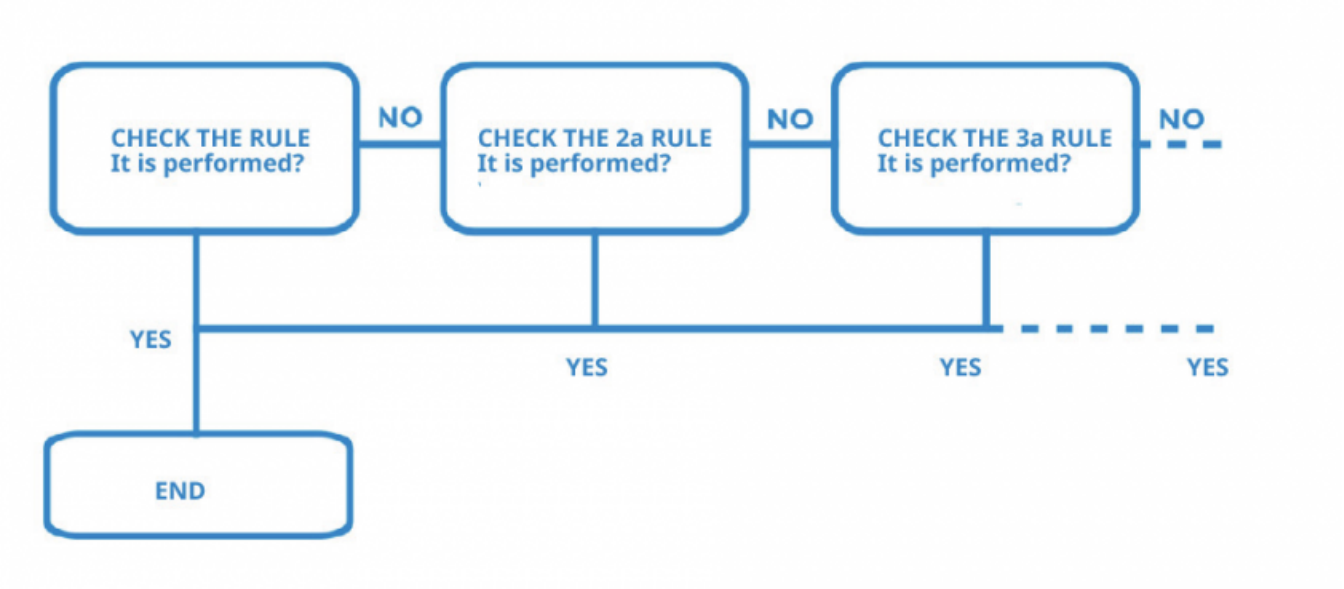
From	Indicate a condition in the From field: (sender), if not present leave the field blank
To	Indicate a condition in the To field: (recipient), if not present leave the field blank
Subject	Indicate a condition in the Object field, if not present leave the field blank
Body	Indicate a condition in the 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.



Logic:



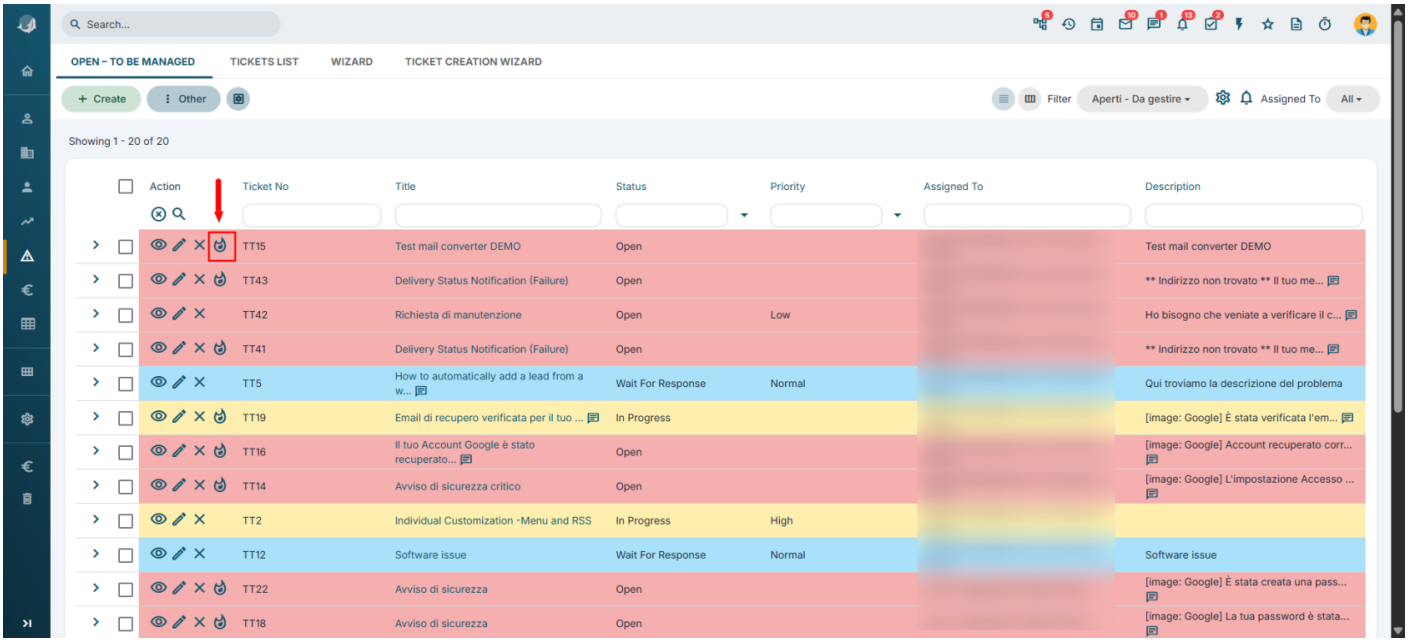
Scan Now

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

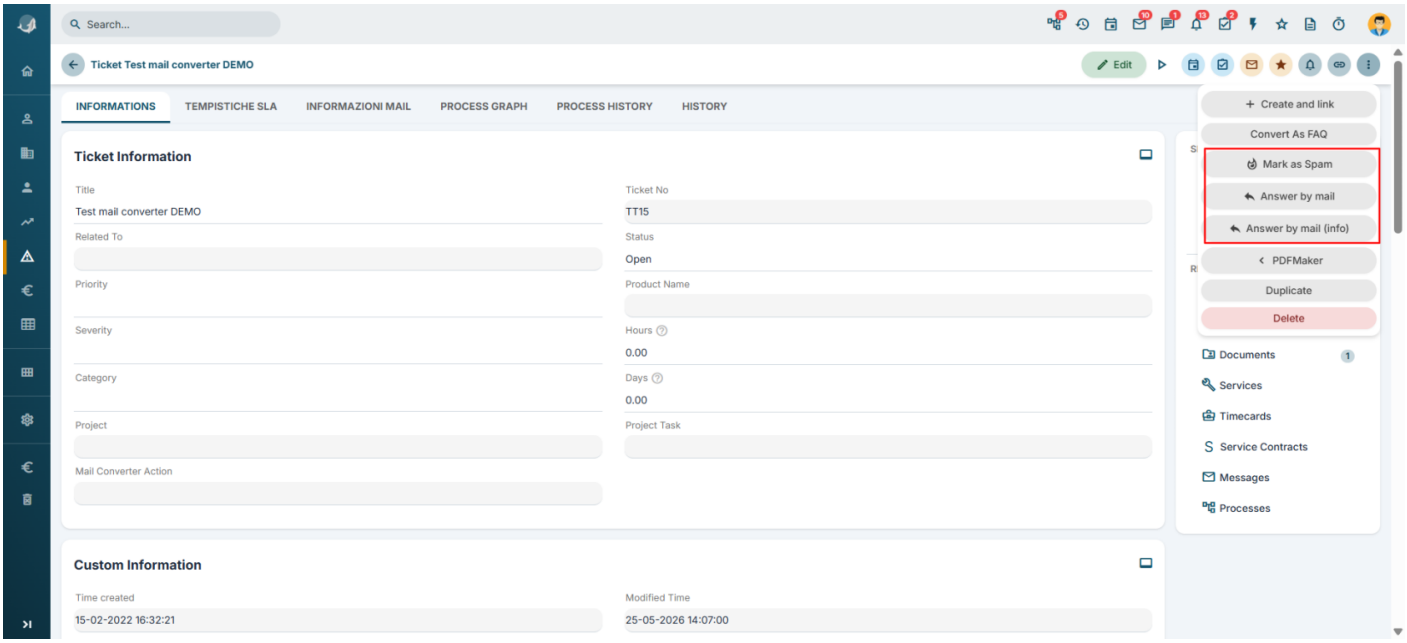
Warning! To activate the automatic check, you need to activate a job in the vtenext server. See the CRONJOB -– Processes to plan chapter.

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:



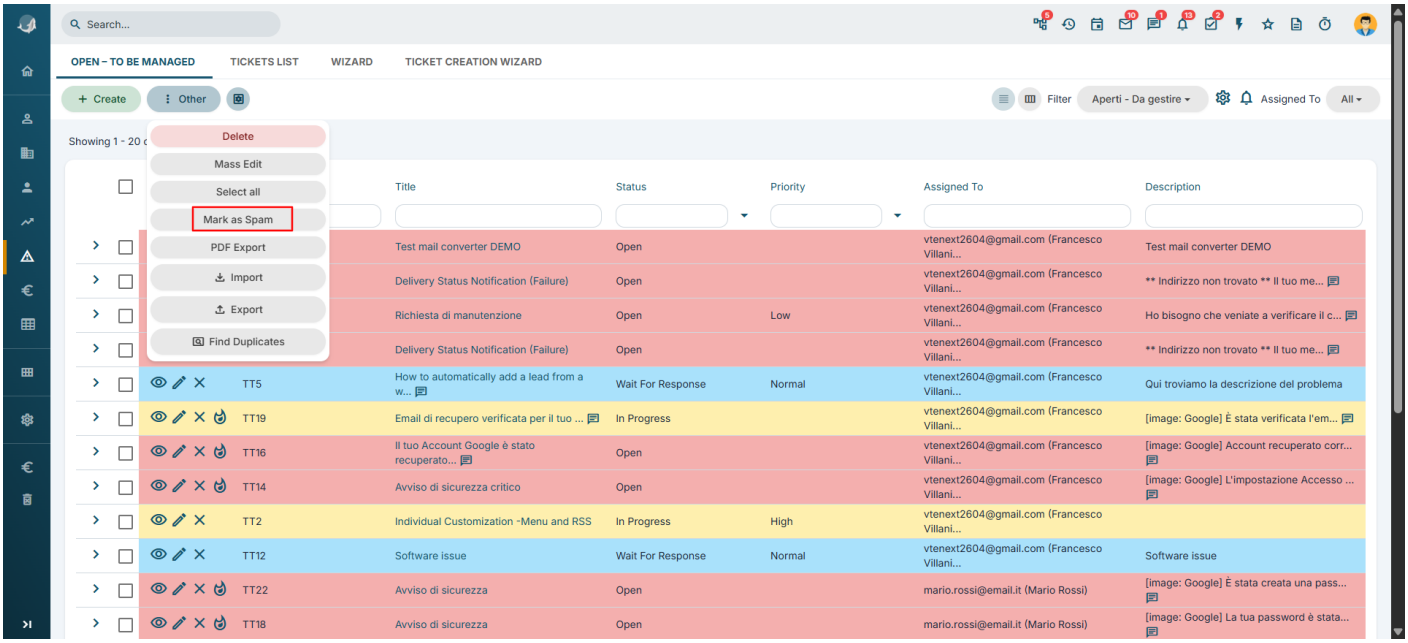
Mark as Spam	In this way the email address of the sender will be put in spam. Furthermore, the ticket will be delated. **Note:** The procedure may produce two different outcomes, depending on the record present in the “Related To” field. General case When the procedure is executed, the ticket and its related messages are deleted. The messages are also moved to the Spam folder of the email account associated with the Mail Scanner. “Deep clean” case If the “Related To” field contains a Lead whose “Lead Source” field is set to “Mail Converter”, and all undeleted tickets associated with that Lead were created through the Mail Scanner, VTenext performs a “deep clean”.In this case, the following are deleted: • the Lead; • all tickets associated with the Lead; • all messages linked to the deleted tickets. In this case as well, the messages are moved to the Spam folder of the email account associated with the Mail Scanner.
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. **Note:** A new feature has been activated that allows, through code (so customers only need to submit a request on the vtenext support portal), the activation of the user's signature when replying using this function.

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. **Note:** A new feature has been activated that allows, through code (so customers only need to submit a request on the vtenext support portal), the activation of the thread for replies. In this case, the thread will consist of the last response received from the customer + the response the user provides to the customer.

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.

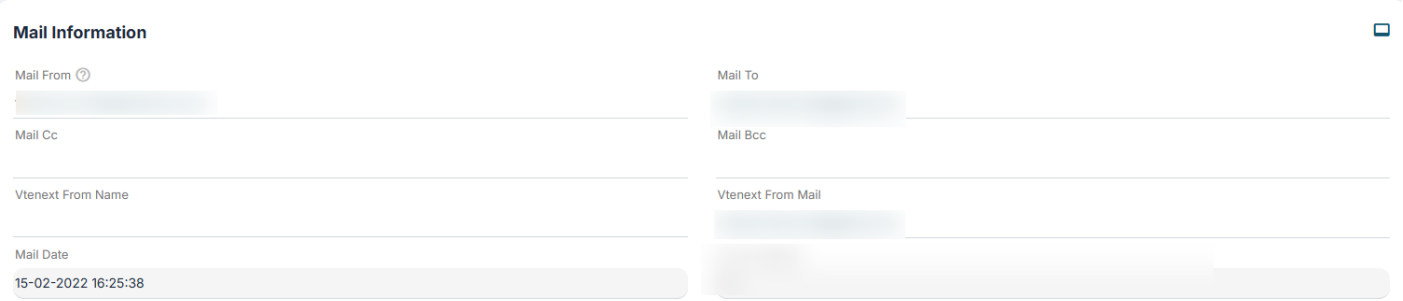
There is another way to massively mark as spam a group of emails (tickets). Go to the list view, tick the ticets you want to mark as spam, click on the button “Other”, and chose **“Mark as spam”** .



Within the Ticket record, there is a block called **Mail Information** that contains a set of fields related to senders and recipients that generate those tickets via the Mail Converter. Let’s look at them in detail:

Mail From	the sender’s email address
Mail To	the recipient’s email address, i.e. the one configured in the Mail Converter
Mail Cc	any other addresses included in CC

Mail Bcc	any other addresses included in BCC
Vtenext From Name	the name of the vtenext sender linked to the email account (only if present)
Mail Mittente vtenext	the vtenext sender's email address, which may correspond either to the address used by the Mail Converter (if replying with the generic mailbox "Reply via mail INFO"), or to the user's email address (if replying with the user mailbox "Reply via mail")
Data Mail	the exact date and time when the email generated the ticket (or when the email was delivered to the address configured in the Mail Converter)



Mail Converter Management Examples

Intermediate configuration

I need to import all emails from **info@example.it** and avoid importing emails that come from Aruba (or any other specific address or domain).

1. Configure the email from **SETTINGS > MAIL CONVERTER**.
2. During **RULE SETUP**, enter the three rules that will control this configuration (in this order, from top to bottom):
   - If the **Sender (FROM)** contains `"@aruba.it"`, the **Action** is **"Do nothing"**.
   - If the **Subject** matches the Regex `"Ticket Id: ([0-9]+)"`, set **Match** to **"All conditions"**.
3. Manage the folders as usual (**INBOX** for incoming mail and **SPAM** for unwanted mail), and the configuration is complete.

Advanced configuration

I need to import all emails from **info@example.it** send a **TICKET OPENING** email to the customer so they are notified, and make sure that if the customer replies using that opening email, the CRM does not create a duplicate (i.e. it does not open a new ticket).

1. Create a process that, upon creation of a Ticket with the field **Mail Converter Rule = Support** (or whatever name you give to your configuration), sends an email to the customer who opened the ticket. The template can be enriched with various details, such as the subject (which may contain the original Ticket title, the ticket number itself, and

the **Ticket ID variable**, which is essential for automatically linking reply emails).

IMAGE

Configuration of the second task, that is, sending the ticket opening email to the customer. The email subject should be, for example: ***Opening $1-ticket_no - $1-ticket_title - Ticket Id: $1-crmid***
Note that the ***Ticket Id*** *has been added, which will generate the ticket ID in the email subject. This ID will be in the format* ***9x123456*** *(unlike the one generated by the Mail Converter, which will only be* ***123456****).*

2. Configure the email from **SETTINGS > MAIL CONVERTER**.
3. During **RULE SETUP**, enter the three rules that will govern how this configuration works (in this order, from top to bottom).

   IMAGE

   Regex rule on the Subject, with 9x placed before the parentheses, and Match set to “All Conditions.”

   IMAGE

   Standard Regex rule on the Subject with All Conditions set to “Matches.”

   IMAGE

   Any Condition set to the option “Matches” and Create Ticket as the Action.

4. Manage the folders as usual (**INBOX** for incoming mail and **SPAM** for unwanted mail), and the configuration is complete here.

Revision #2
Created 2026-07-06 15:07:49 UTC by Admin
Updated 2026-09-28 15:39:40 UTC by Alberto