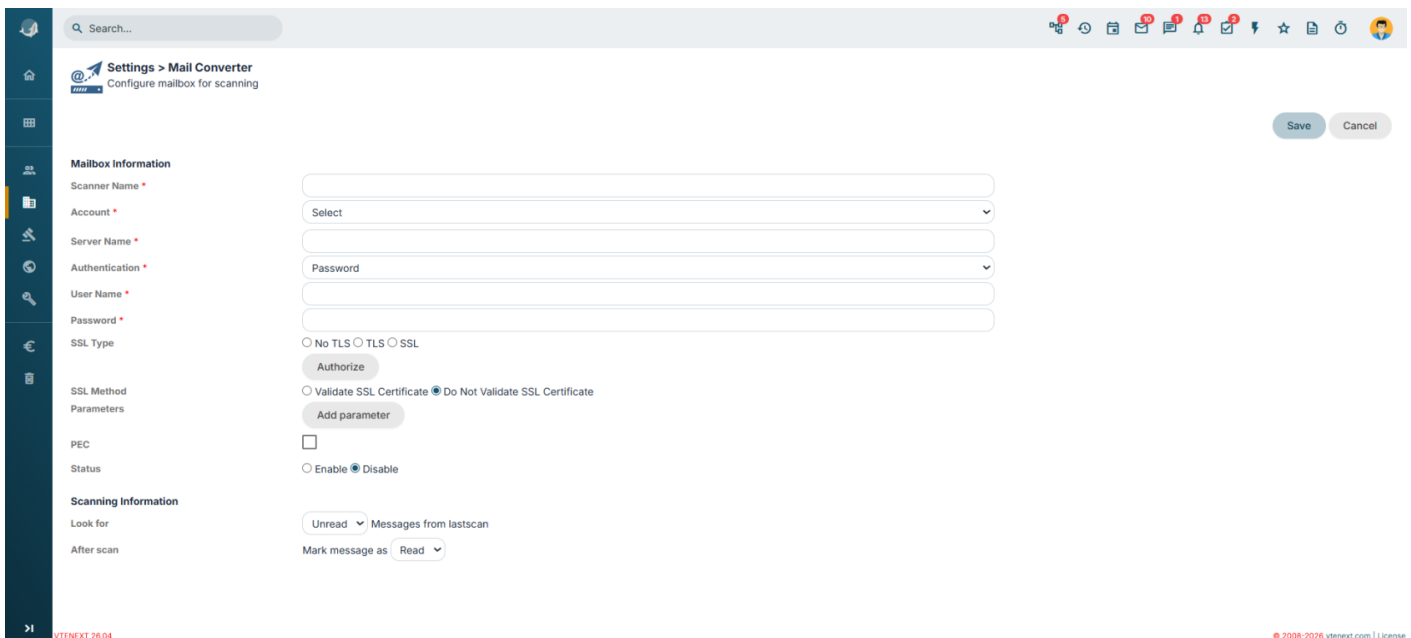


17.15 Mail Converter

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 sidebar on the left with various icons. The main content area is titled 'Settings > Mail Converter' and 'Configure mailbox for scanning'. It contains two sections: 'Mailbox Information' and 'Scanning Information'. The 'Mailbox Information' section includes fields for 'Scanner Name', 'Account' (a dropdown menu), 'Server Name', 'Authentication' (a dropdown menu), 'User Name', and 'Password'. Below these are radio buttons for 'No TLS', 'TLS', and 'SSL', with an 'Authorize' button. There are also radio buttons for 'Validate SSL Certificate', 'Do Not Validate SSL Certificate' (which is selected), and an 'Add parameter' button. The 'Status' section has radio buttons for 'Enable' and 'Disable' (which is selected). The 'Scanning Information' section includes a 'Look for' dropdown menu set to 'Unread' and a 'Mark message as' dropdown menu set to 'Read'. The page also features a top search bar, a top navigation bar with various icons, and a bottom status bar showing 'VTENEXT 20.04' and a copyright notice.

VTENEXT 20.04

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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.

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 attached .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


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

Update

Select All | Unselect All

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:

Mail Converter Rule Information

Scanner Name

Mail Converter

From

To

Subject

Body

Match

Action

-- Select Condition --

-- Select Condition --

Contains

Not Contains

Equals

Not Equals

Begins with

Ends with

Regex

Any Condition

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: - 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.



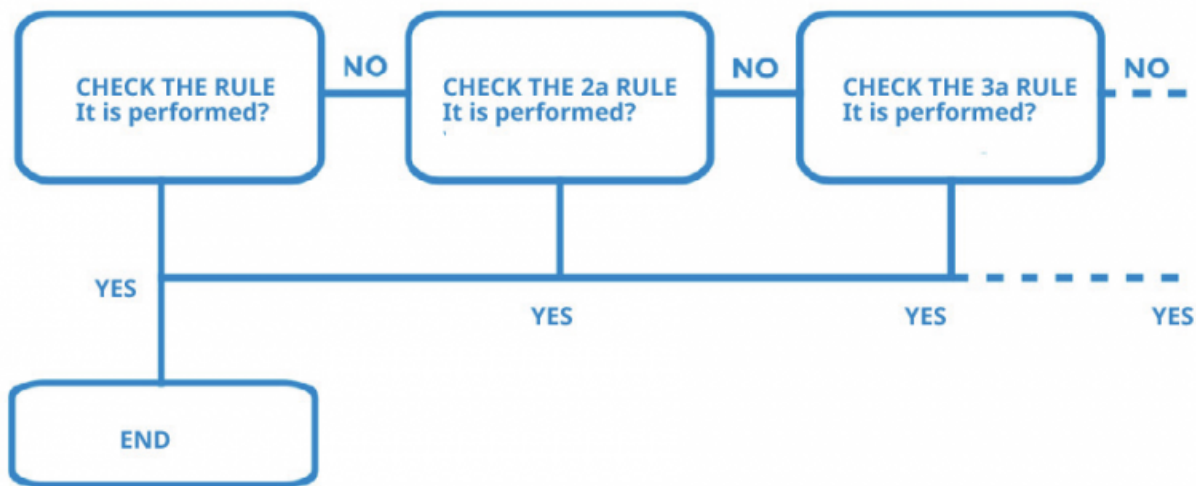
Settings > Mail Converter

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.

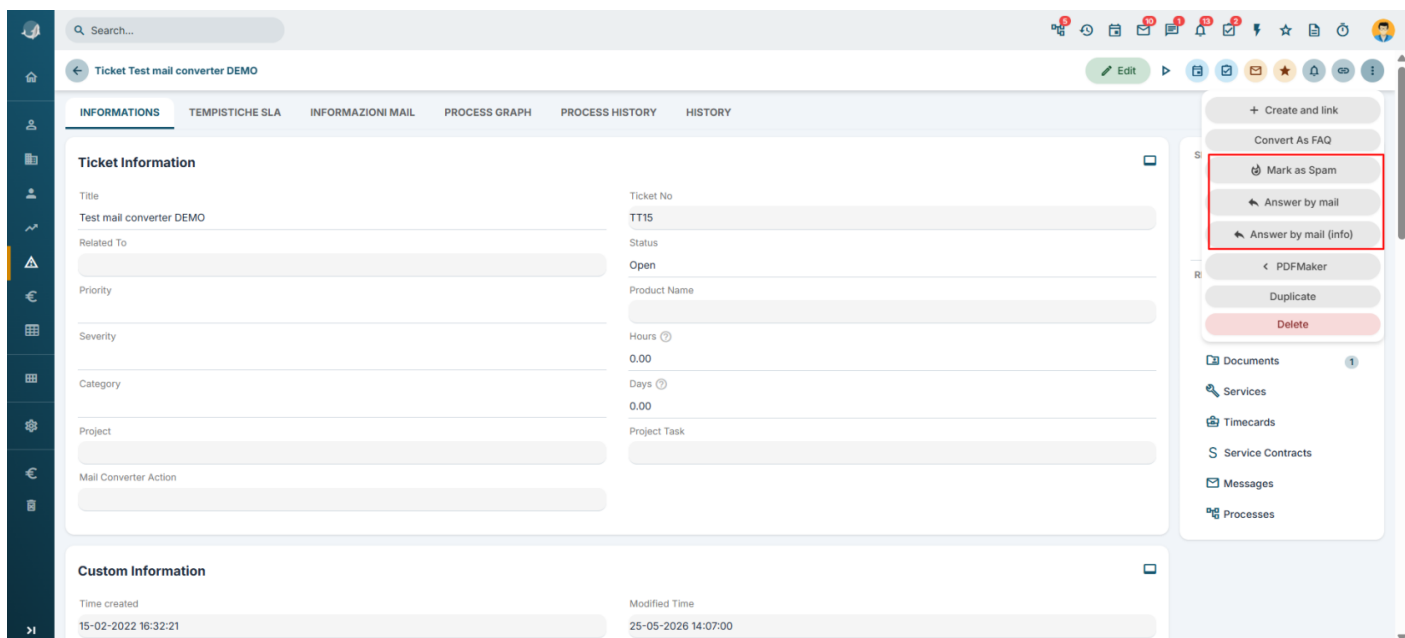
What happens to the Trouble Tickets module?

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.

Action	Ticket No	Title	Status	Priority	Assigned To	Description
☐	TT15	Test mail converter DEMO	Open			Test mail converter DEMO
☐	TT43	Delivery Status Notification (Failure)	Open			** Indirizzo non trovato ** Il tuo me...
☐	TT42	Richiesta di manutenzione	Open	Low		Ho bisogno che veniate a verificare il c...
☐	TT41	Delivery Status Notification (Failure)	Open			** Indirizzo non trovato ** Il tuo me...
☐	TT5	How to automatically add a lead from a w...	Wait For Response	Normal		Qui troviamo la descrizione del problema
☐	TT19	Email di recupero verificata per il tuo ...	In Progress			[image: Google] È stata verificata l'em...
☐	TT16	Il tuo Account Google è stato recuperato...	Open			[image: Google] Account recuperato cort...
☐	TT14	Avviso di sicurezza critico	Open			[image: Google] L'impostazione Accesso ...
☐	TT2	Individual Customization -Menu and RSS	In Progress	High		
☐	TT12	Software issue	Wait For Response	Normal		Software issue
☐	TT22	Avviso di sicurezza	Open			[image: Google] È stata creata una pass...
☐	TT18	Avviso di sicurezza	Open			[image: Google] La tua password è stata...

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 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. 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 tickets you want to mark as spam, click on the button "Other", and chose **"Mark as spam"**.

OPEN - TO BE MANAGED

TICKETS LIST WIZARD TICKET CREATION WIZARD

+ Create Other

Showing 1 - 20 of 20 items

Title	Status	Priority	Assigned To	Description
Test mail converter DEMO	Open		vtenext2604@gmail.com (Francesco Villani...)	Test mail converter DEMO
Delivery Status Notification (Failure)	Open		vtenext2604@gmail.com (Francesco Villani...)	** Indirizzo non trovato ** Il tuo me... [Image]
Richiesta di manutenzione	Open	Low	vtenext2604@gmail.com (Francesco Villani...)	Ho bisogno che veniate a verificare il c... [Image]
Delivery Status Notification (Failure)	Open		vtenext2604@gmail.com (Francesco Villani...)	** Indirizzo non trovato ** Il tuo me... [Image]
How to automatically add a lead from a w... [Image]	Wait For Response	Normal	vtenext2604@gmail.com (Francesco Villani...)	Qui troviamo la descrizione del problema
Email di recupero verificata per il tuo ... [Image]	In Progress		vtenext2604@gmail.com (Francesco Villani...)	[Image: Google] È stata verificata l'em... [Image]
Il tuo Account Google è stato recuperato... [Image]	Open		vtenext2604@gmail.com (Francesco Villani...)	[Image: Google] Account recuperato corr... [Image]
Avviso di sicurezza critico	Open		vtenext2604@gmail.com (Francesco Villani...)	[Image: Google] L'impostazione Accesso ... [Image]
Individual Customization -Menu and RSS	In Progress	High	vtenext2604@gmail.com (Francesco Villani...)	
Software issue	Wait For Response	Normal	vtenext2604@gmail.com (Francesco Villani...)	Software issue
Avviso di sicurezza	Open		mario.rossi@email.it (Mario Rossi)	[Image: Google] È stata creata una pass... [Image]
Avviso di sicurezza	Open		mario.rossi@email.it (Mario Rossi)	[Image: Google] La tua password è stata... [Image]

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 Information

Mail From ?

Mail Cc

Vtenext From Name

Mail Date

15-02-2022 16:25:38

Mail To

Mail Bcc

Vtenext From Mail

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 #1

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