

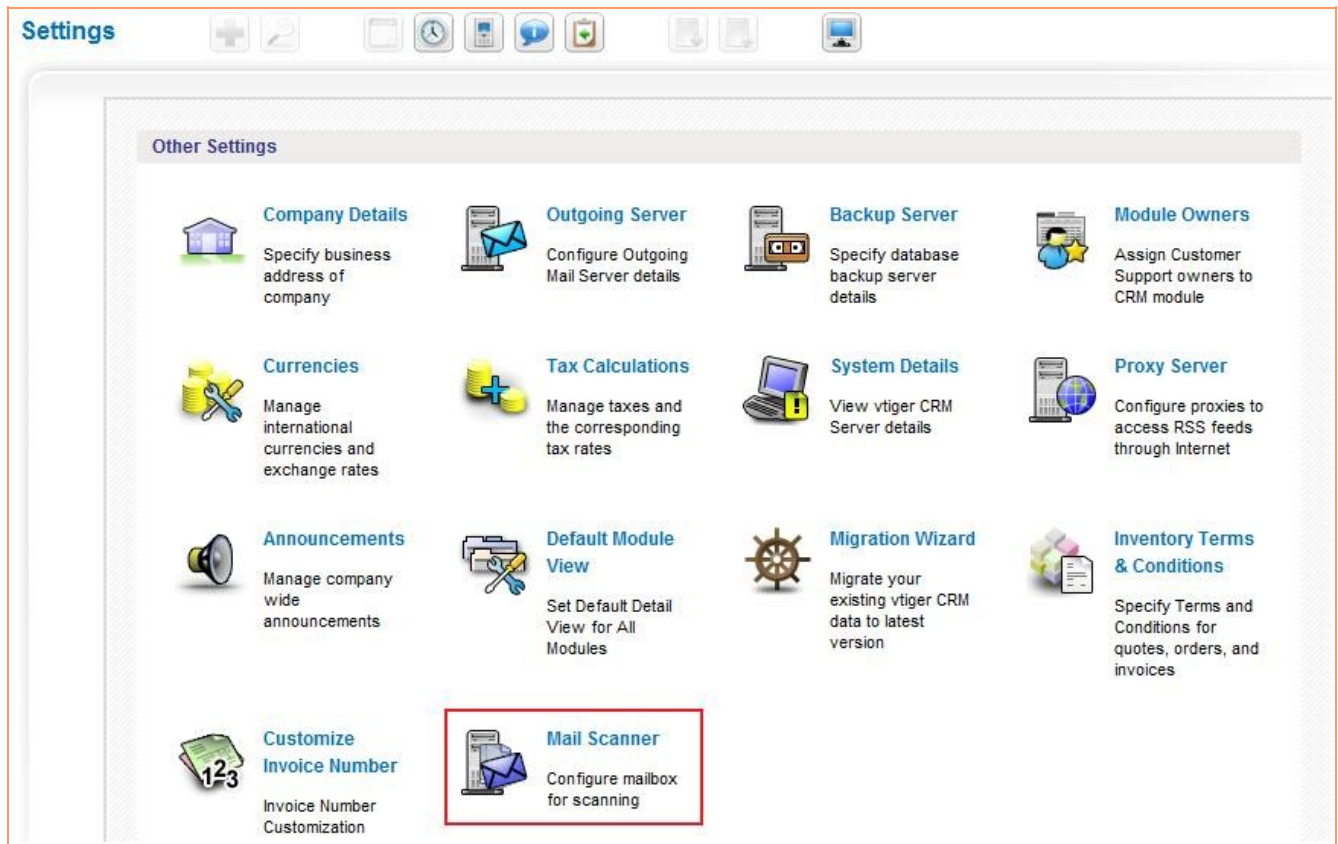
vtiger CRM Mail Scanner

Table of Contents

About.....	2
Configure Mailbox.....	3
Select Folders.....	5
Setup Rule.....	5
Rule Priority.....	7
Manual Scanning.....	8
Automated Scanning.....	8

About

Mail Scanner adds the capability to scan your mailbox take actions on messages which matches the criteria. vtiger CRM administrator has the access to Mail Scanner through Settings Page.



The screenshot shows the 'Settings' page in vtiger CRM, specifically the 'Other Settings' section. The page is titled 'Settings' and contains a grid of 16 settings options, each with an icon and a brief description. The 'Mail Scanner' option is highlighted with a red border.

Setting Name	Description
Company Details	Specify business address of company
Outgoing Server	Configure Outgoing Mail Server details
Backup Server	Specify database backup server details
Module Owners	Assign Customer Support owners to CRM module
Currencies	Manage international currencies and exchange rates
Tax Calculations	Manage taxes and the corresponding tax rates
System Details	View vtiger CRM Server details
Proxy Server	Configure proxies to access RSS feeds through Internet
Announcements	Manage company wide announcements
Default Module View	Set Default Detail View for All Modules
Migration Wizard	Migrate your existing vtiger CRM data to latest version
Inventory Terms & Conditions	Specify Terms and Conditions for quotes, orders, and invoices
Customize Invoice Number	Invoice Number Customization
Mail Scanner	Configure mailbox for scanning

Configure Mailbox

You need to provide the mailbox information on which scan needs to be performed. By default the mailbox will be disabled as no information is available.

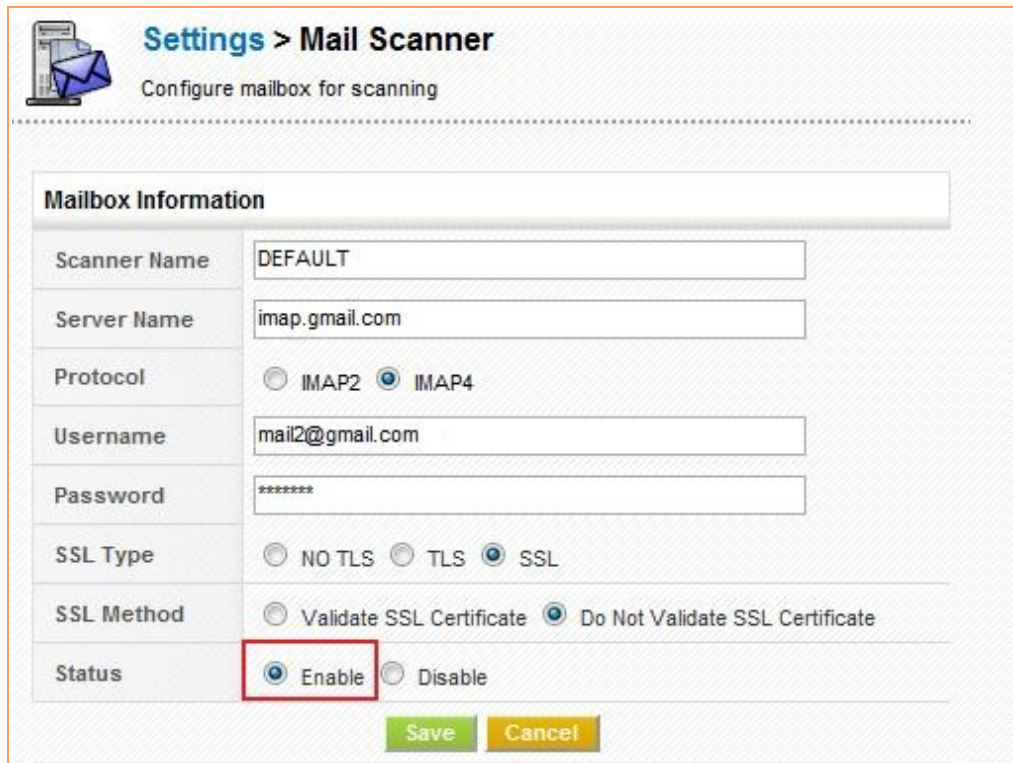


Settings > Mail Scanner
Configure mailbox for scanning

Mailbox Information Edit

Scanner Name	
Server Name	
Protocol	
Username	
SSL Type	
SSL Method	
Connect URL	
Status	Disabled

Make sure to enable the status before saving the mailbox information.



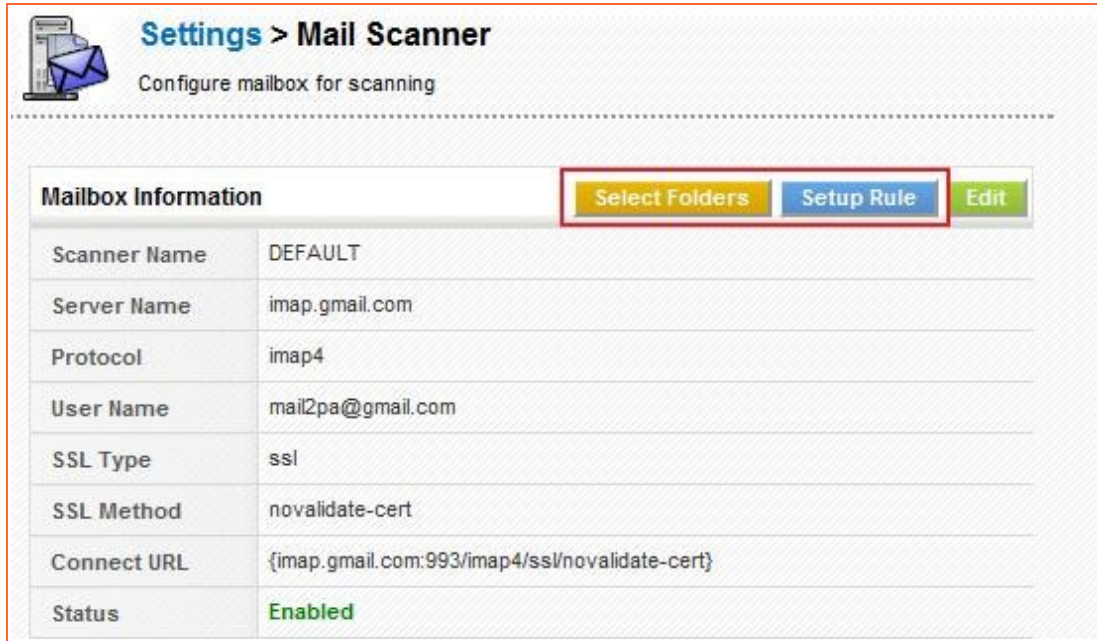
Settings > Mail Scanner
Configure mailbox for scanning

Mailbox Information

Scanner Name	DEFAULT
Server Name	imap.gmail.com
Protocol	<input type="radio"/> IMAP2 <input checked="" type="radio"/> IMAP4
Username	mail2@gmail.com
Password	*****
SSL Type	<input type="radio"/> NO TLS <input type="radio"/> TLS <input checked="" type="radio"/> SSL
SSL Method	<input type="radio"/> Validate SSL Certificate <input checked="" type="radio"/> Do Not Validate SSL Certificate
Status	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

Save Cancel

When you click on Save, using the given information connection is tried to the mail server, all the available folder names will be fetched. If it fails then information will not be Saved otherwise the information gets saved.



Settings > Mail Scanner
Configure mailbox for scanning

Mailbox Information		Select Folders	Setup Rule	Edit
Scanner Name	DEFAULT			
Server Name	imap.gmail.com			
Protocol	imap4			
User Name	mail2pa@gmail.com			
SSL Type	ssl			
SSL Method	novalidate-cert			
Connect URL	{imap.gmail.com:993/imap4/ssl/novalidate-cert}			
Status	Enabled			

NOTE: If you disable status of the mailbox, scan on it will not be performed.

Select Folders

After mailbox setup you can select the folders which should be considered for scanning the mails. You can exclude or include the folder by selecting/de-selecting the checkbox as shown below:

Settings > Mail Scanner
Configure mailbox for scanning

Mailbox Folder Select All | Unselect All

<input checked="" type="checkbox"/> INBOX	<input checked="" type="checkbox"/> [Gmail]/All Mail	<input type="checkbox"/> [Gmail]/Drafts	<input type="checkbox"/> [Gmail]/Sent Mail
<input type="checkbox"/> [Gmail]/Spam	<input type="checkbox"/> [Gmail]/Starred	<input type="checkbox"/> [Gmail]/Trash	<input checked="" type="checkbox"/> test1
<input checked="" type="checkbox"/> test10	<input checked="" type="checkbox"/> test11	<input checked="" type="checkbox"/> test12	<input checked="" type="checkbox"/> test13
<input checked="" type="checkbox"/> test14	<input checked="" type="checkbox"/> test15	<input checked="" type="checkbox"/> test16	<input checked="" type="checkbox"/> test17
<input checked="" type="checkbox"/> test18	<input checked="" type="checkbox"/> test19	<input checked="" type="checkbox"/> test2	<input checked="" type="checkbox"/> test20
<input checked="" type="checkbox"/> test3	<input checked="" type="checkbox"/> test4	<input checked="" type="checkbox"/> test5	<input checked="" type="checkbox"/> test6
<input checked="" type="checkbox"/> test7	<input checked="" type="checkbox"/> test8	<input checked="" type="checkbox"/> test9	

Setup Rule

You can setup one or more rules on a mailbox, which lets you take action on a mail based on the criteria.

Settings > Mail Scanner
Configure mailbox for scanning

MailScanner Rule Information

Scanner Name	DEFAULT
From	<input type="text"/>
To	<input type="text"/>
Subject	-- Select One -- <input type="text"/>
Body	-- Select One -- <input type="text"/>
Match	<input checked="" type="radio"/> All Condition <input type="radio"/> Any Condition
Action	Create Ticket <input type="text"/>

Rule criteria are evaluated as follows:

From	Check for the input occurrence in the FROM field of the email
To	Check for the input occurrence in the TO field of the email
Subject	Compare the input with SUBJECT of email using one of the condition selected (Contains, Not Contains, Equals, Not Equals, Begins With, Not Begins With)
Body	Compare the input with BODY of email using one of the condition selected (Contains, Not Contains, Equals, Not Equals, Begins With, Not Begins With)
Match	All Condition - All the input conditions should evaluate as true to take Action Any Condition - At least one condition should evaluate as true to take Action

One finding a successful matching email, the action will be applied on it as follows:

Create Ticket	Creates a new trouble ticket record with the following: Title = SUBJECT of email Description = BODY of email Attachments of email will be linked to the trouble ticket record Lookup is made for existing Contact/Account based on FROM field of email and ticket is associated to matching record (if found)
Add to Contact[FROM]	Lookup is made for existing Contact based on FROM field of email. On success a new email record is created and is associated to matching record.
Add to Contact[TO]	Lookup is made for existing Contact based on TO field of email. On success a new email record is created and is associated to matching record.
Add to Account[FROM]	Lookup is made for existing Account based on FROM field of email. On success a new email record is created and is associated to matching record.
Add to Account[TO]	Lookup is made for existing Account based on TO field of email. On success a new email record is created and is associated to matching record.

NOTE: If mailbox does not have any rules setup it will not be scanned.

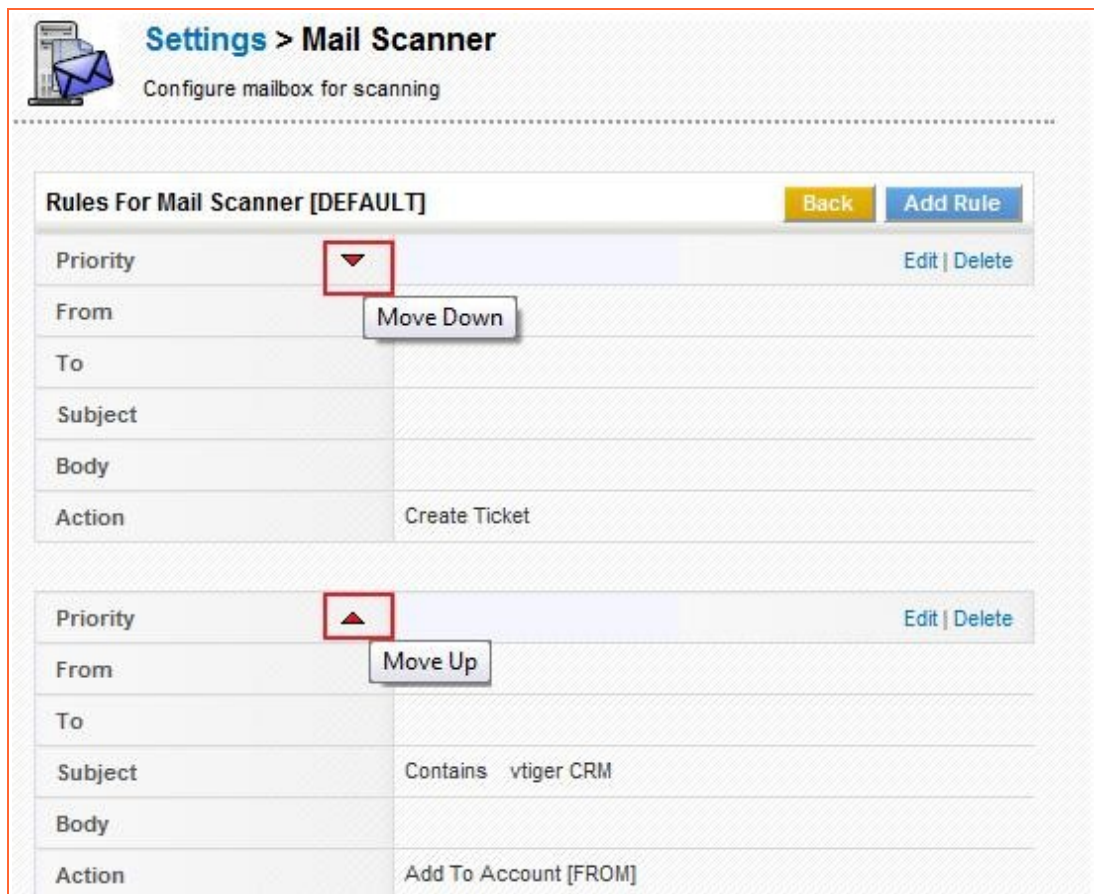
Example: Rule to create trouble ticket from any email is shown below:

The screenshot shows the 'Settings > Mail Scanner' configuration page. The page title is 'Settings > Mail Scanner' with a sub-header 'Configure mailbox for scanning'. Below this, there is a section titled 'Rules For MailScanner [DEFAULT]' with 'Back' and 'Add Rule' buttons. A table below shows the rule configuration:

From	
To	
Subject	
Body	
Action	Create Ticket

Rule Priority

One or more Rules for the mailbox which are applied in sequence while Scanning. You can change the order (Priority) by clicking the arrow marks.



The screenshot shows the 'Settings > Mail Scanner' configuration page. It features a header with a mail icon and the text 'Settings > Mail Scanner' and 'Configure mailbox for scanning'. Below this is a section titled 'Rules For Mail Scanner [DEFAULT]' with 'Back' and 'Add Rule' buttons. Two rules are listed, each with a 'Priority' field containing a dropdown arrow, and 'Edit | Delete' links. The first rule has a 'Move Down' button, and the second has a 'Move Up' button. The rules are defined by conditions on 'From', 'To', 'Subject', and 'Body', and an 'Action'.

Rules For Mail Scanner [DEFAULT]		Back	Add Rule
Priority		▼	Edit Delete
From		Move Down	
To			
Subject			
Body			
Action	Create Ticket		
Priority		▲	Edit Delete
From		Move Up	
To			
Subject	Contains vtiger CRM		
Body			
Action	Add To Account [FROM]		

NOTE: If the email matches the conditions defined for a given rule, the remaining rules are not applied.

Manual Scanning

After setting up at least one rule you can scan the mailbox. Click on the **Scan Now** button. It might take long time based on the amount of emails that will be present in the mailbox (configured folders)

Automated Scanning

MailScannerCron.php script handles scanning of the mailbox configured. It can be invoked from a CRON job. The following parameters should be made available:

app_key	Application Unique Key as defined in config.inc.php (\$application_unique_key) of vtiger CRM. This variable is generated during the installation. NOTE: If app_key is invalid the script does shows denies executing.
scannername	DEFAULT

Example: Your CRON script could contain like this:

```
wget "http://en.vtiger.com/wip/MailScannerCron.php?scannername=DEFAULT&app_key=340..."  
-O /dev/null
```

NOTE: You can configure cron/MailScannerCron.sh and use the script.