

SuiteCRM

1	Delete default data in sales - contacts, accounts, opportunities, leads etc.
2	Add users as needed • update user name and information • update time zone "America/Los Angeles" GMT-7 (user will be able to update profile when first logging in)
3	Configure Default Outgoing email in admin panel - admin/email • smtp.ionos.com • port: 465 • Enable: SSL • Use SMTP Authentication - check yes • Users may send as this account's identity - check yes
4	Create email Outbound Account <u>for every user</u> that will use email in the system that will sync with personal email, (if not configured, users may choose to send email from the system email). Individual users may also complete this task themselves. • User same SMTP config as system email • Complete the "outbound configuration" before using the test button.
5	Configure Inbound accounts in admin/inbound email <u>for every user</u> that will use email in the system. Individual users may also complete this task themselves. • Create New personal email, name the record as "... INBOUND" • Auth type: Basic Auth • Mail Servicer Adress: imap.ionos.com • protocol: IMAP • Port = 993 • Use SSL - check yes • User Name - enter email address. • Password - enter email password • Monitored folders - select inbox • Trash - select trash • Sent - select Sent

6	Connect outbound email to inbound email record in admin/personal email account - complete for all users that will be able to email from CRM through the <u>personal inbound email accounts</u>. Individual users may also complete this task themselves. • <i>If outbound email was set up before inbound, then you can do this in one-step.</i>
7	Each user must configure in their own account: Profile / Setting - select check for email every five minutes, and also select the inboxes to check. Mail should appear.
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Revision #2

Created 27 March 2024 13:47:16 by Victoria

Updated 27 March 2024 15:37:14 by Victoria