

Configuring IMAP or POP3 email fetching

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What is Email Fetching?

Mailgun is the email automation service that you can set-up along with an InfoCapture project to initiate the creation of a ticket simply by sending an email to a dedicated email address.

A typical example would be setting up an email such as support@mycompany.com that automatically creates a Helpdesk ticket in InfoCapture.

How to Setup Email Fetching:

Step1: Set-up dedicated email address for this purpose

It is recommended to set-up a new dedicated POP3 or IMAP account for this purpose to make testing easier and to avoid the system getting a large number of backlog emails at the start of the project.

Here is the information you need:

- Incoming mail (IMAP or POP3) server address: for example pop.mycompany.com
- Port number: Typically POP3 is 995 IMAP is 993
- Username: Email account username
- Password: Email account password
- Using SSL (yes/no)

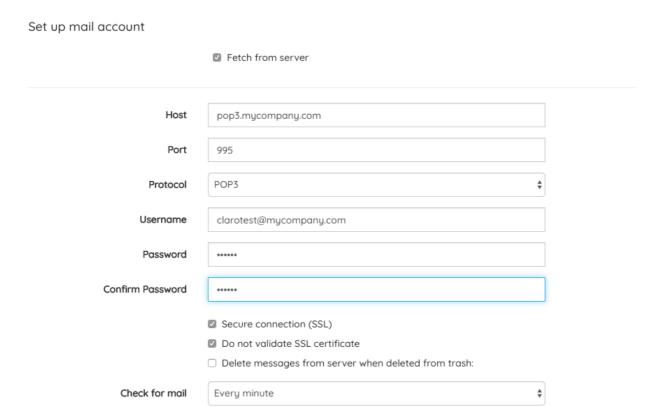
Step 2: Test your email account

Test your email account to ensure the mailbox is working and can receive emails.

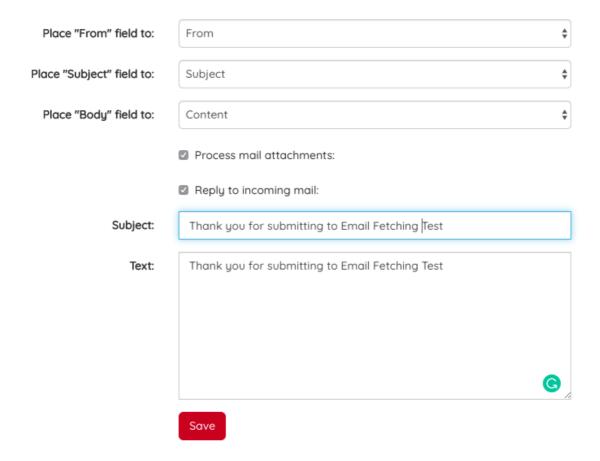
In InfoCapture navigate to the 'Project Properties' of the form you wish to enable this on and check 'Handle Incoming mail'



Check "Fetch from server" and enter the details, here is an example:



Map From (email address), Subject and Body of the email to the fields available in the InfoCapture project you've already set-up.



Step 4: Test email fetching

Test by sending email and if successful an infocapture ticket will be automatically created on that project.

Depending the number of emails, It could take some time to read and process the emails and how often it was set up on Step3. The default value is every hour.

Troubleshooting

ISSUE: I can see the emails in POP3 or IMAP server but no InfoCapture tickets are created.

Step1: Check Background task

InfoCapture email fetching is processed through a background task. Please check for errors and make sure background task is working.

Admin > System

License OK Indexing/Searching Service OK Documents converter service OK Background task OK Server Software Linux/Unix, Apache 3 Show support information

Step 2: Check if there any errors on the server logs

Step 3: Check permission on the data folder on the server to make sure webservers can write folders typically it is located at [claromentis root]/data/mail

Step 4: Check database entry if the email is fetched in the database tables mail_messages and mail_fetched_messages

What are the features & limitations?

Who is the submitter when the ticket is submitted this way?

Tickets will be marked as submitted by "Guest" or "No user" when it is created through email fetching. It is possible to create a trigger and send a notification whenever a ticket has been changed or notes have been added back to the sender (From field must be a short or medium string email type).

Does it handle email attachments?

If 'Process mail attachments' is checked, any attachment sent from the initial email will be captured and stored in the Files tab within the InfoCapture Project.

Can the submitter send follow up notes?

No, currently it is not possible to send follow up notes on the email.