



Inbox and Contact Events

INBOX SETTINGS

From the Desk Top the most recent emails of the computer's inbox are displayed in the Inbox view. The amount of emails showing and refresh rate is set per User, as a large amount of emails takes a long time to load.

In the User form, scroll down in the top right settings to see the Inbox settings.

Roles	Name	Demo Accord - Viola Scott	Default Department	Construction
Layout Settings	Keyname	SCOTT VIOLA	Default Tempdesk	Demo - Events Shift Co 2
Questionnaire	Login Name	VHS	Analysis Code	C2
Division Access	Job Title	Consultant	Nominal Segment (m...	12
Department Maintenance	E-Mail Address	vhs@accorddemo.uk	Report View Level	999
Popup Escalations	Short ID	VS	Report Print Level	999
	Template for New Users	☐	Report Export Level	999
	Not In Use	☐	Combo Box Filter	
	Override Form ID		Inbox Limit	60
	Startup Form		Inbox Refresh Rate	15

The Inbox refresh rate will auto update the Desk Top if this is set, so it does not have to be done manually.

LINKING INCOMING EMAILS TO IQX RECORDS

If an email address is matched in IQX then the email can be saved directly to the main record. By using Drag and Drop an email can be saved linked to any record.

To attach an email as a Contact Event to a Vacancy: If the Vacancy will be found in Current Vacancies then go there, Expand, move the Desk top to the right and drag from Inbox onto the Vacancy Position. The cursor will show as an arrow with a box. Drop and a contact event will be created.

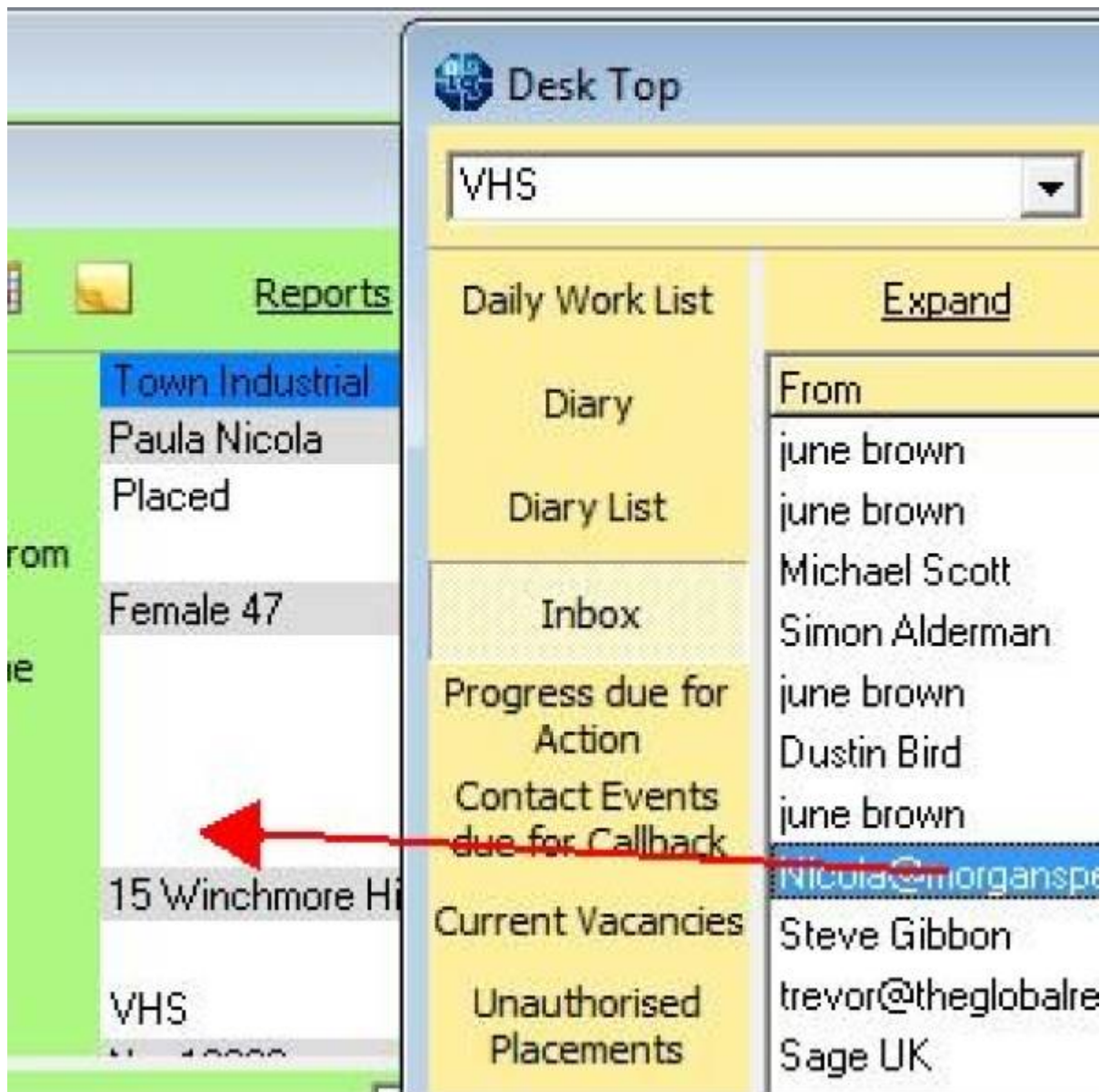
Company	A & M Stephens
Contact	A Stephens
Job Title	Legal Secretary
No. of Posts	1
PO Number	
EDates	From 30/07/2012
Pay / Charge	/
EStatus / Codes	Current
EDept./Desk/Co...	/ VHS
Client Department	
E***Vacancy Q'...	

From	IQX Contact	Subject
june brown		RE: BCL Leg
june brown		RE: BCL Leg
Michael Scott	Michael Scott	RE: BCL Leg
Simon Alderman	Simon Alderman	RE: Tempde
june brown		RE: BCL Leg
Dustin Bird	Sian Monique Binks	Concept Car
june brown		BCL Legal
Nicola@morgansperc		Meeting



ATTACHING AN EMAIL TO A RECORD WITHOUT AN EMAIL ADDRESS

Expand the record, move the Desk top to the right and drag from the inbox onto the record. For Person and Contact records you will be asked if you want to add the email address to the record.



A contact event is created and you are given the option to save the email address against the record or not.
Yes will add the email address.
No will NOT add the email address.



==== SAVING AN ATTACHMENT FROM AN EMAIL IN THE INBOX TO THE DOCUMENTS VIEW OF A



RECORD ===== If an email has attachments they do NOT get saved with the contact event, but they CAN be saved in a Document view – such as Vacancy Documents, Client Documents – providing that Document TYPES have been set up.

The inbox shows how many attachments there are to an email - but the count does include images that are part of the signature as well as deliberately attached items.

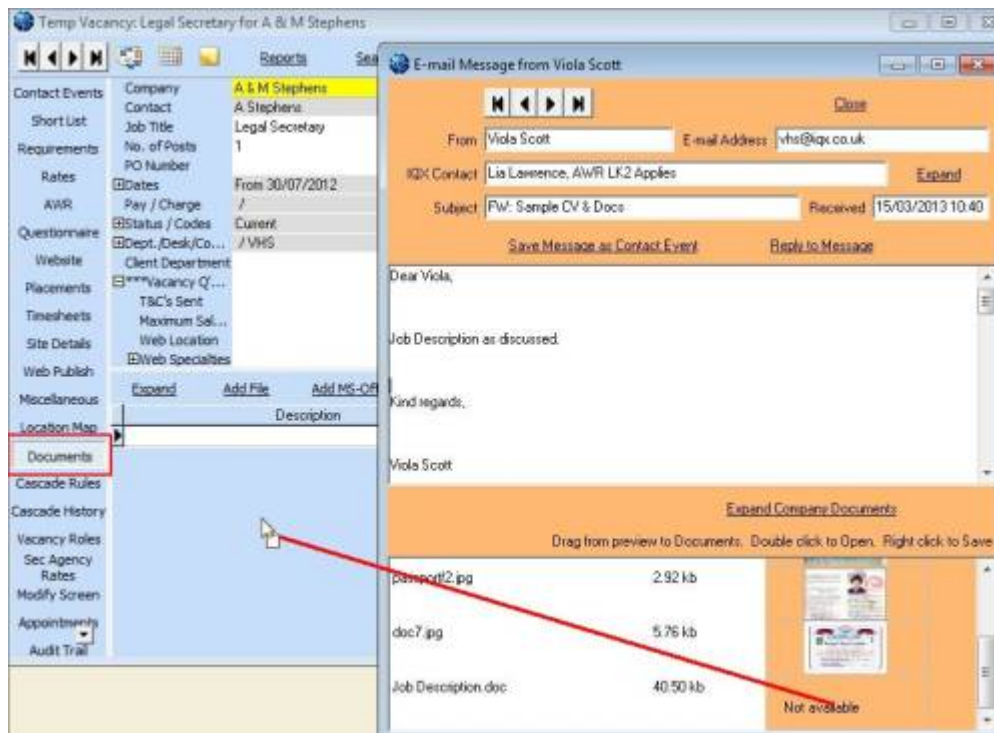
When you **expand** the email the attachments are visible at the bottom.

There is a button to expand the Person or Contact Documents view but it is possible to drag to other record Documents view.

You can also Double click **on the coloured preview section** to open. Right Click to save in a folder.

The screenshot displays the iqx software interface. At the top, there are buttons: 'Expand', 'Save Message as Contact Event', 'Reply to Message', and 'Delete Message'. Below these is a table with columns: 'From', 'Subject', 'Received', and 'Attachment'. The first row shows an email from 'Viola Scott' with subject 'Lia Lawrence, AWR LK2 Fw: Sample CV & Docs' received on '15/03/2013 10:40' with 4 attachments. The second row shows an email from 'Michael Scott' with subject 'RE: Temocdesk shift view site details.doc' received on '15/03/2013 10:22' with 1 attachment. Below the table, the email content is displayed. The 'From' field shows 'Viola Scott' and the 'E-mail Address' is 'vhs@iqx.co.uk'. The 'Subject' is 'Lia Lawrence, AWR LK2 Applies' and the 'Received' date is '15/03/2013 10:40'. There are buttons for 'Expand', 'Save Message as Contact Event', and 'Reply to Message'. The email body starts with 'Dear Viola,' followed by 'Job Description as discussed.' and 'Kind regards, Viola Scott'. Below the email body, there is a section titled 'Expand Company Documents' with a note: 'Drag from preview to Documents: Double click to Open. Right click to Save'. This section lists three attachments: 'passport12.jpg' (2.92 kb), 'doc7.jpg' (5.76 kb), and 'Job Description.doc' (40.50 kb). The 'Job Description.doc' attachment is highlighted with a red box. To the right of the attachments, there is a preview area showing a document icon and the text 'Not available'.

To drag – open the record to receive the documents and go to the Document view



You will be asked to select a type, then the document is added as a File to the documents. It will not be directly editable.

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From:
<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:
https://iqxusers.co.uk/iqxhelp/doku.php?id=4_inbox_and_contact&rev=1395232777

Last update: **2017/11/16 21:55**

