



# 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.

The screenshot shows a user form for 'Demo Accord - Viola Scott'. The form is divided into two main sections: 'Roles' and 'Settings'. The 'Roles' section includes fields for Name, Keyname, Login Name, Job Title, E-Mail Address, Short ID, Template for New Users, Not In Use, Override Form ID, and Startup Form. The 'Settings' section includes fields for Default Department, Default Tempdesk, Analysis Code, Nominal Segment (m...), Report View Level, Report Print Level, Report Export Level, Combo Box Filter, Inbox Limit, and Inbox Refresh Rate. The 'Inbox Limit' is set to 60 and the 'Inbox Refresh Rate' is set to 15.

| Roles                  | Settings               |
|------------------------|------------------------|
| Name                   | Default Department     |
| Keyname                | Default Tempdesk       |
| Login Name             | Analysis Code          |
| Job Title              | Nominal Segment (m...) |
| E-Mail Address         | Report View Level      |
| Short ID               | Report Print Level     |
| Template for New Users | Report Export Level    |
| Not In Use             | Combo Box Filter       |
| Override Form ID       | Inbox Limit            |
| Startup Form           | Inbox Refresh Rate     |

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 using Save Message as a Contact Event.

If the email is not matched to any records in IQX, using Drag and Drop will save the email to the record.

**From version 2.2.10.5** - If the email address is matched to multiple records within IQX, the IQX Contact field on the inbox view will be highlighted red. On expanding the email you will be prompted to select the correct record before saving as a contact event or replying.

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.

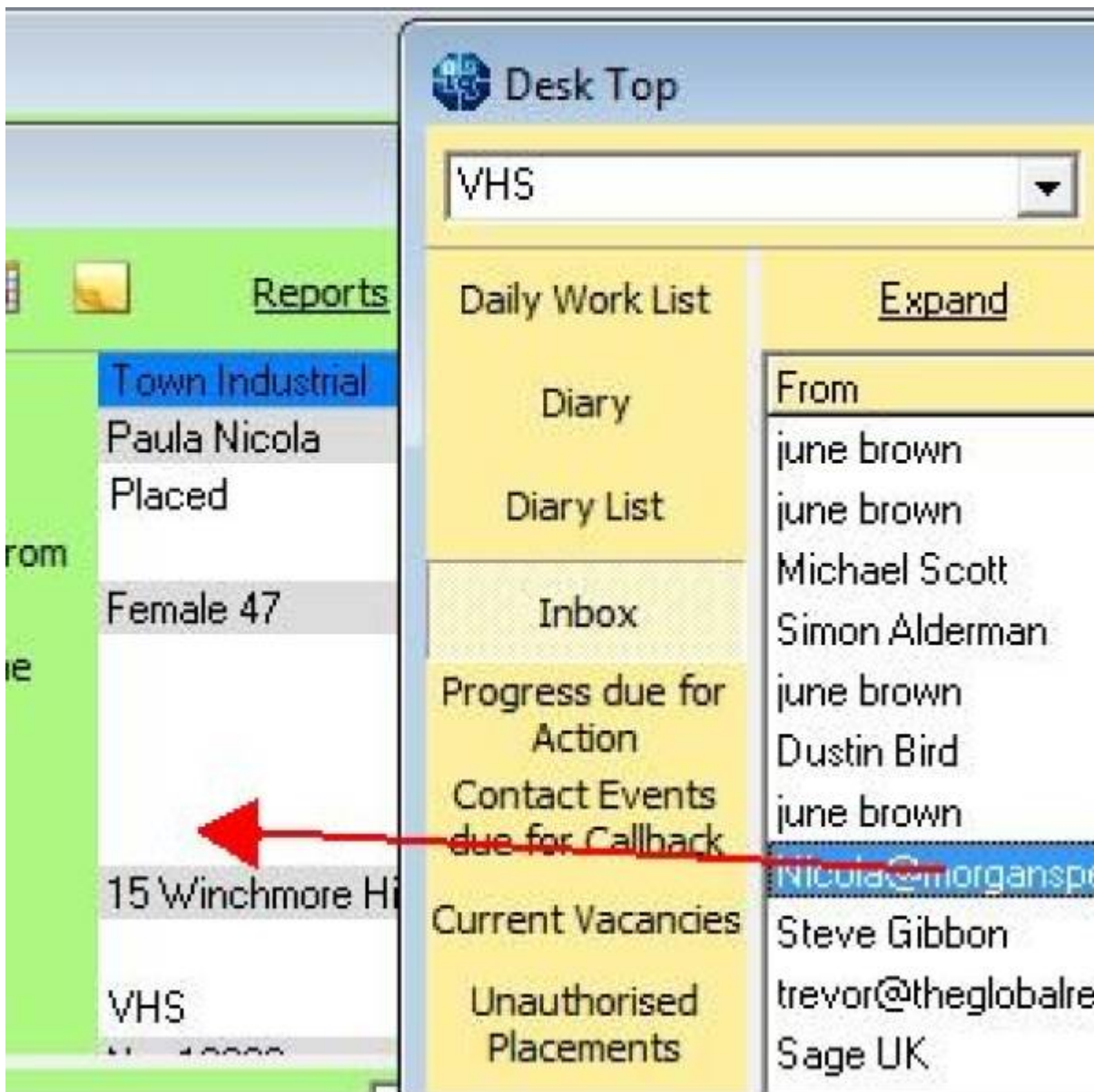


The screenshot displays the iqx system interface. On the left, a record for 'Temp Vacancy: Legal Secretary for A & M Stephens' is shown with fields for Company, Contact, Job Title, No. of Posts, PO Number, Dates, Pay / Charge, Status / Codes, Dept./Desk/Co..., Client Department, and Placements. On the right, a 'Desk Top' panel shows a search bar with 'VHS' and a list of emails. A red arrow points from the 'Legal Secretary' job title in the record to the 'june brown' email entry in the inbox.

| 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@morganspenc |                    | 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.

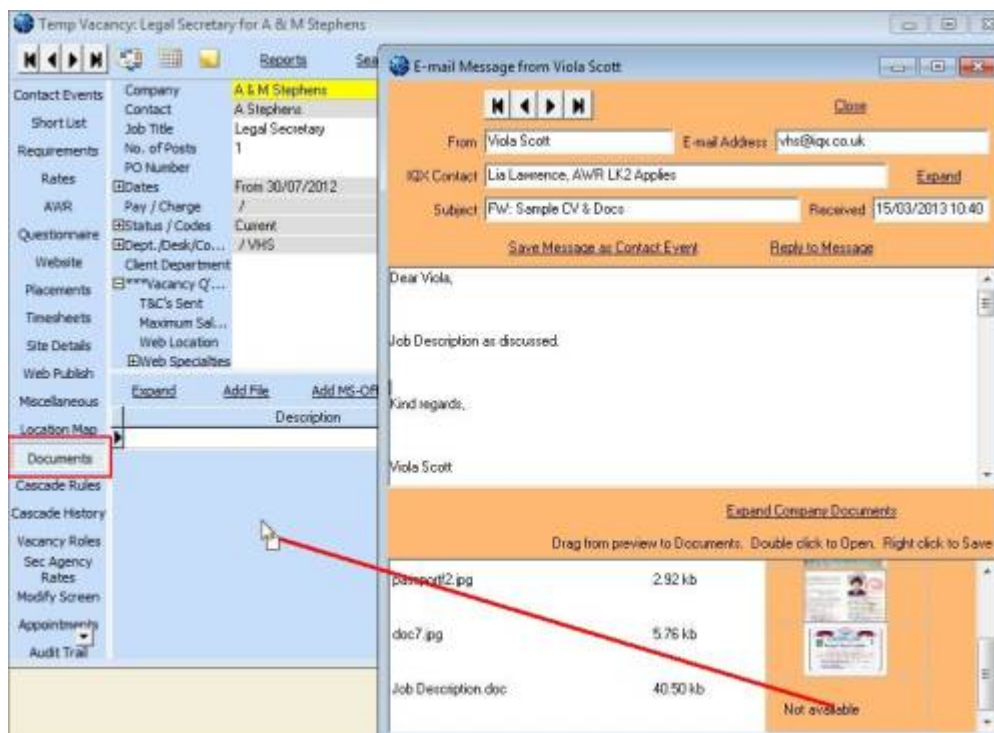
When you **expand** the email the attachments are visible at the bottom.

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', 'IQX Contact', 'Subject', 'Received', and 'Attachment'. The table lists two emails. The first email is from Viola Scott, subject 'Lia Lawrence, AWR LK2 Fw: Sample CV & Docs', received on 15/03/2013 at 10:40, with 5 attachments. The second email is from Michael Scott, subject 'RE: Tarmacdesk shift view the details doc', received on 15/03/2013 at 10:22, with 1 attachment. Below the table, the email content is shown. The first email is expanded, showing the sender's details, subject, and a list of 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. Below the attachments, there is a section titled 'Expand Company Documents' with a red box around it. Below this section, there is a message: 'Drag from preview to Documents: Double click to Open. Right click to Save'. At the bottom, there is a 'Not available' button with a red box around it.

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.

Back to [Hints, Tips and Shortcuts](#)

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

Permanent link:  
[https://iqxusers.co.uk/iqxhelp/doku.php?id=4\\_inbox\\_and\\_contact&rev=1395233900](https://iqxusers.co.uk/iqxhelp/doku.php?id=4_inbox_and_contact&rev=1395233900)

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