



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

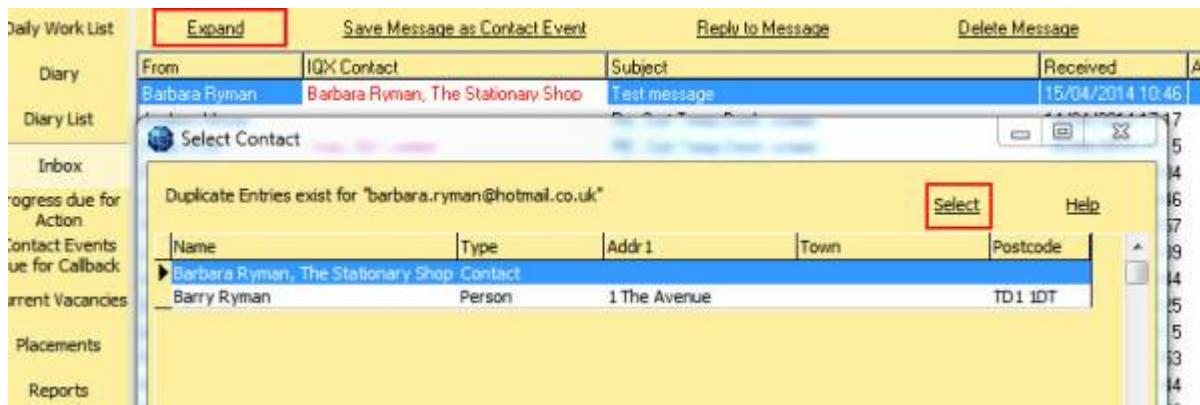
The Inbox refresh rate will auto update the Desk Top if this is set, so it does not have to be done manually.

Linking incoming emails to IQX records

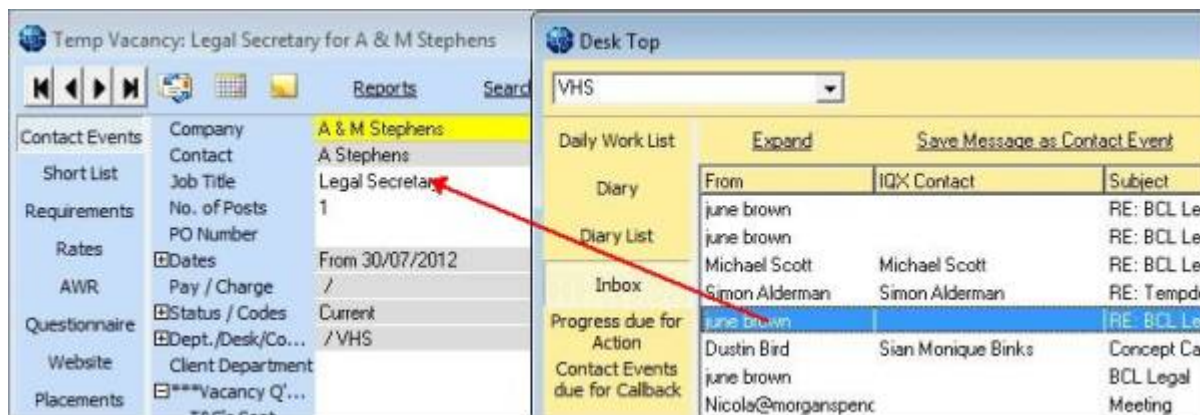
If an email address is matched in IQX then the email can be saved directly to the main record using Save Message as a Contact Event.

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.

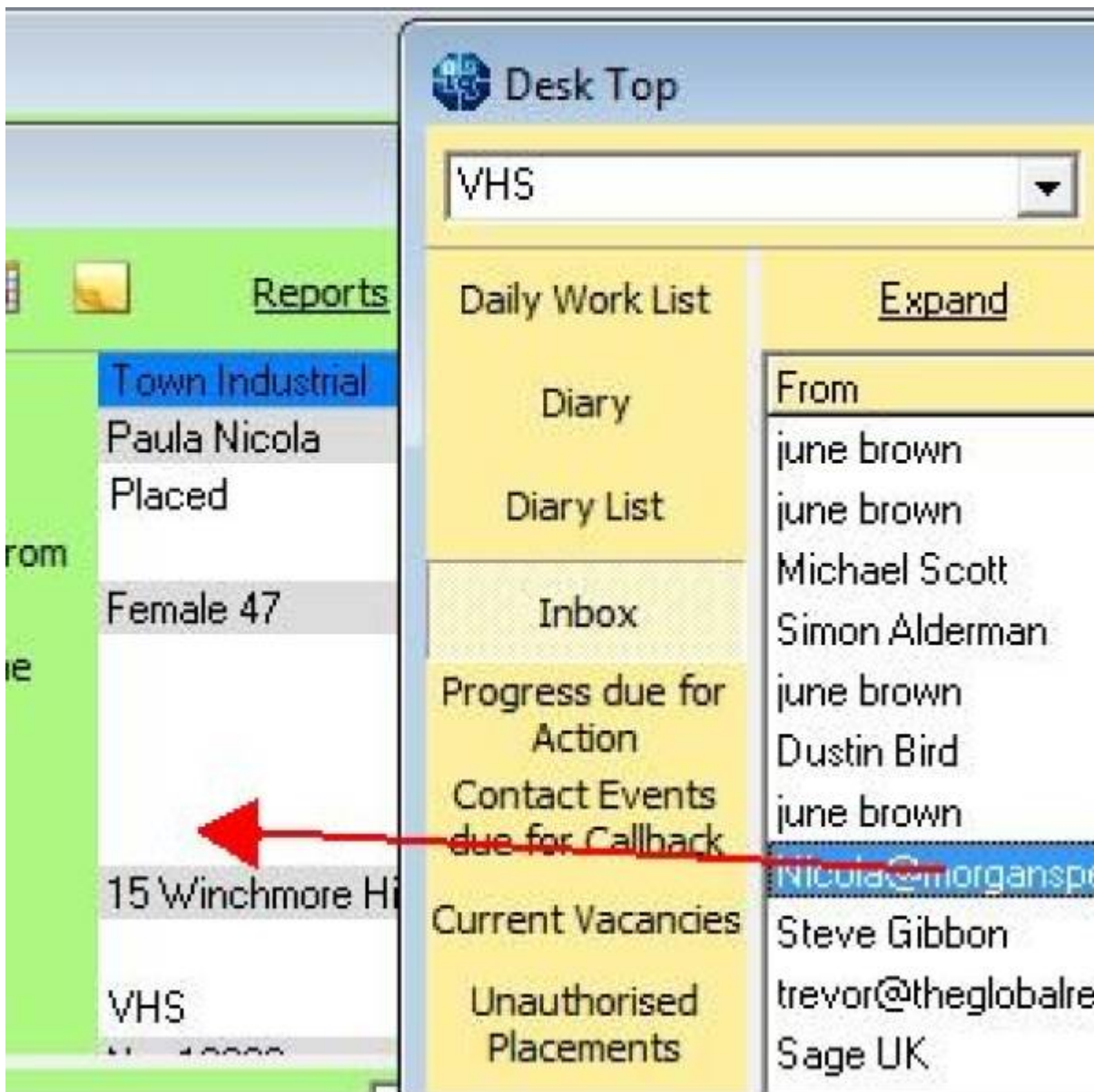


To attach an email as a Contact Event to a Vacancy: If the Vacancy will be found in Current Vacancies then go there, Expand, move the Desk top to the right and drag from Inbox onto the Vacancy Position. The cursor will show as an arrow with a box. Drop and a contact event will be created.



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.

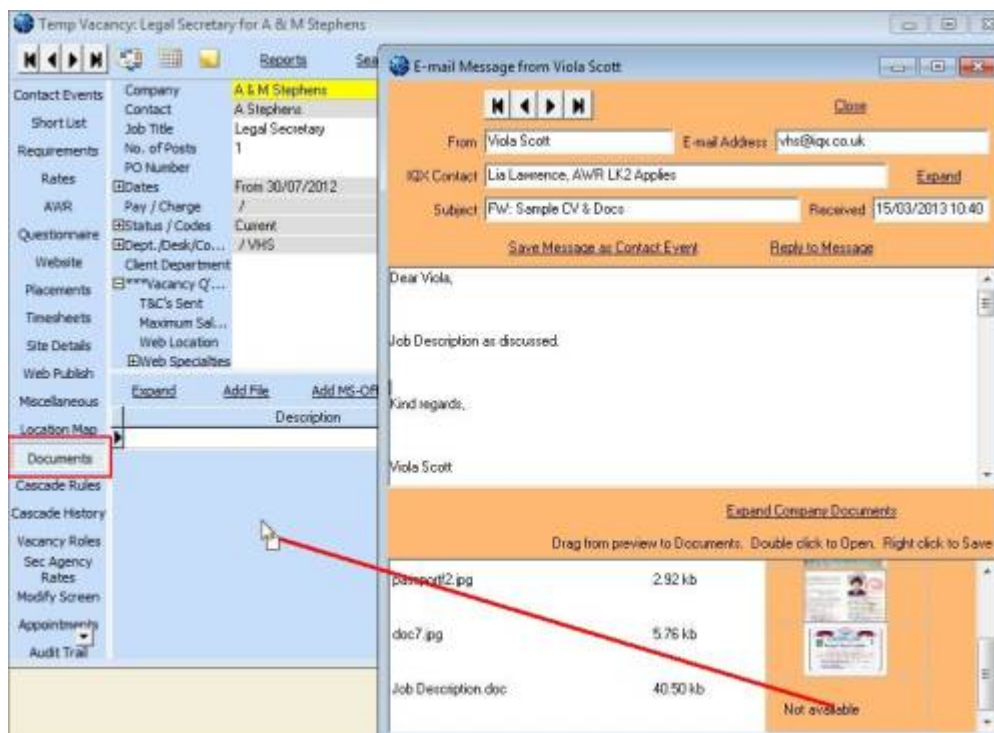
When you **expand** the email the attachments are visible at the bottom.

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: one from Viola Scott and another from Michael Scott. The email from Viola Scott is selected, and its details are shown in a preview window. The preview window includes fields for 'From', 'E-mail Address', 'IQX Contact', 'Subject', and 'Received'. Below these fields are buttons: 'Expand', 'Save Message as Contact Event', and 'Reply to Message'. The email body text is visible, starting with 'Dear Viola,'. At the bottom of the preview window, there is a section titled 'Expand Company Documents' with a note: 'Drag from preview to Documents: Double click to Open. Right click to Save'. Below this section, a list of attachments is shown: '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 'Not available' button, also highlighted with a red box.

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=1512146147

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