



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.

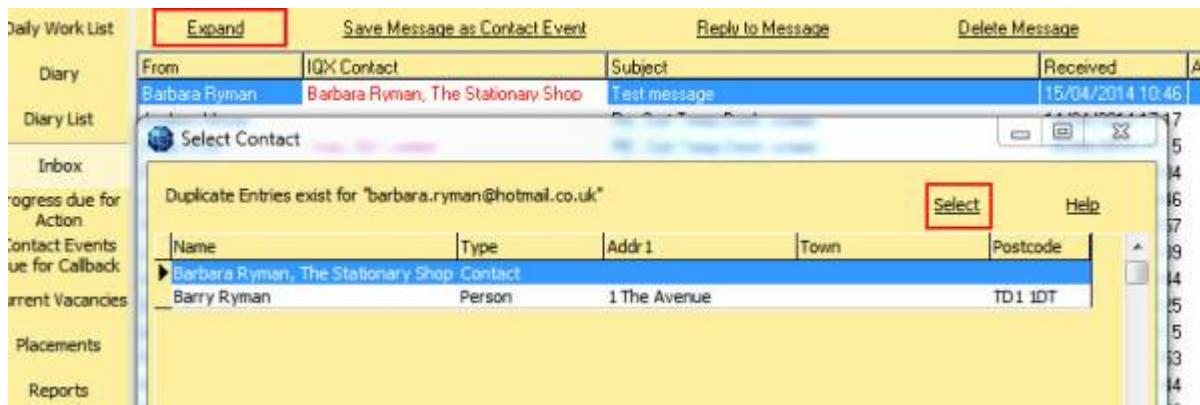
To aide with quickly finding the relevant email you are looking for from version 2.21.08 onwards there is a filter on the inbox. Note this will only filter on emails that are visible in the list, it will not search your whole inbox. In addition to this the columns in the inbox are all sortable so you can click on a column header to order it.

Linking incoming emails to IQX records

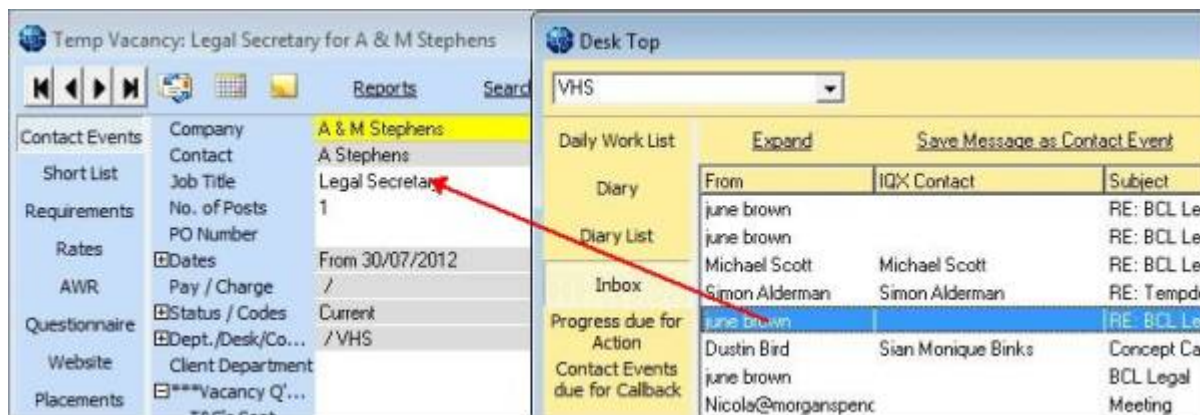
If an email address is matched in IQX then the email can be saved directly to the main record using Save Message as a Contact Event.

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.

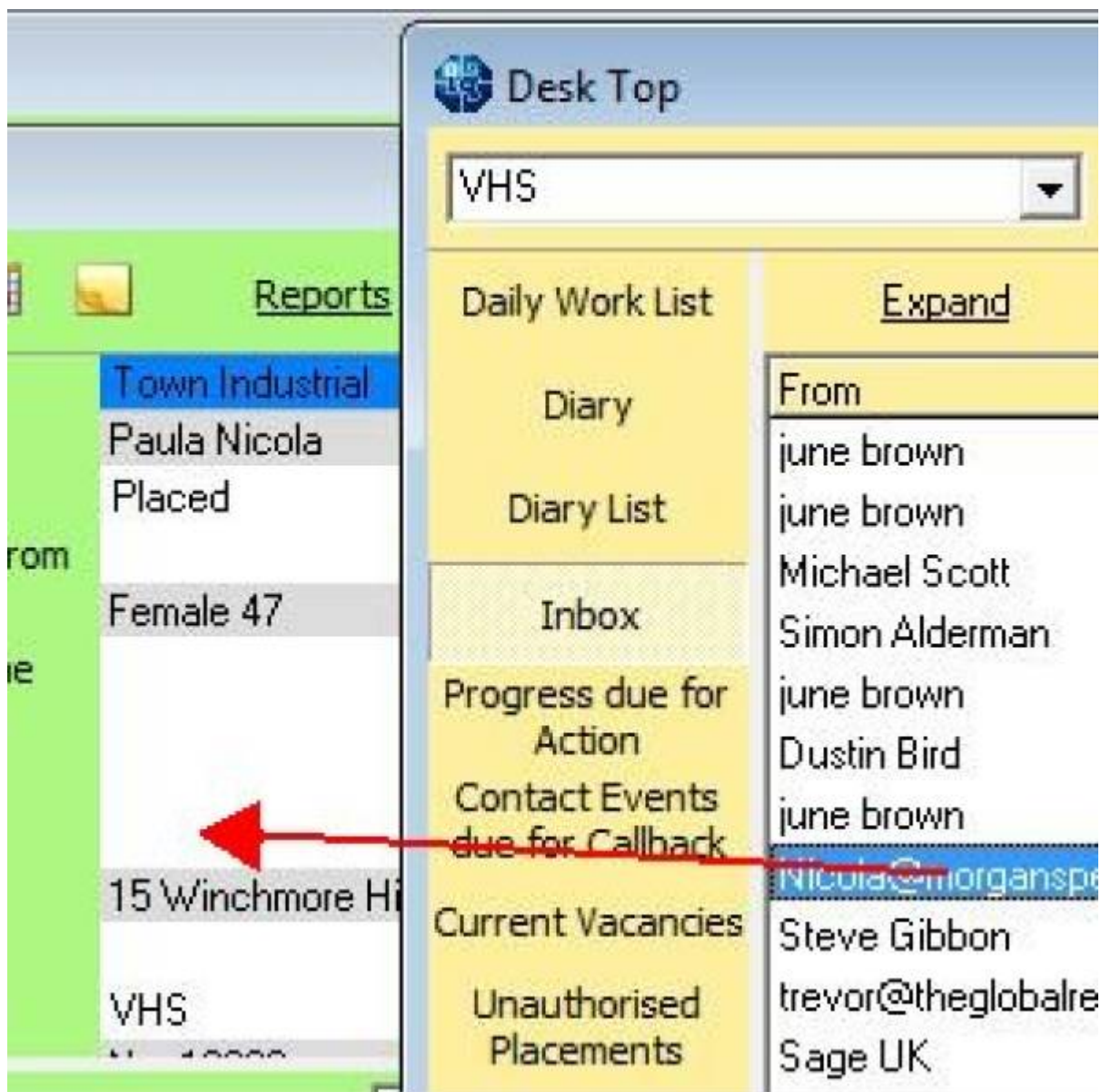


To attach an email as a Contact Event to a Vacancy: If the Vacancy will be found in Current Vacancies then go there, Expand, move the Desk top to the right and drag from Inbox onto the Vacancy Position. The cursor will show as an arrow with a box. Drop and a contact event will be created.



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.

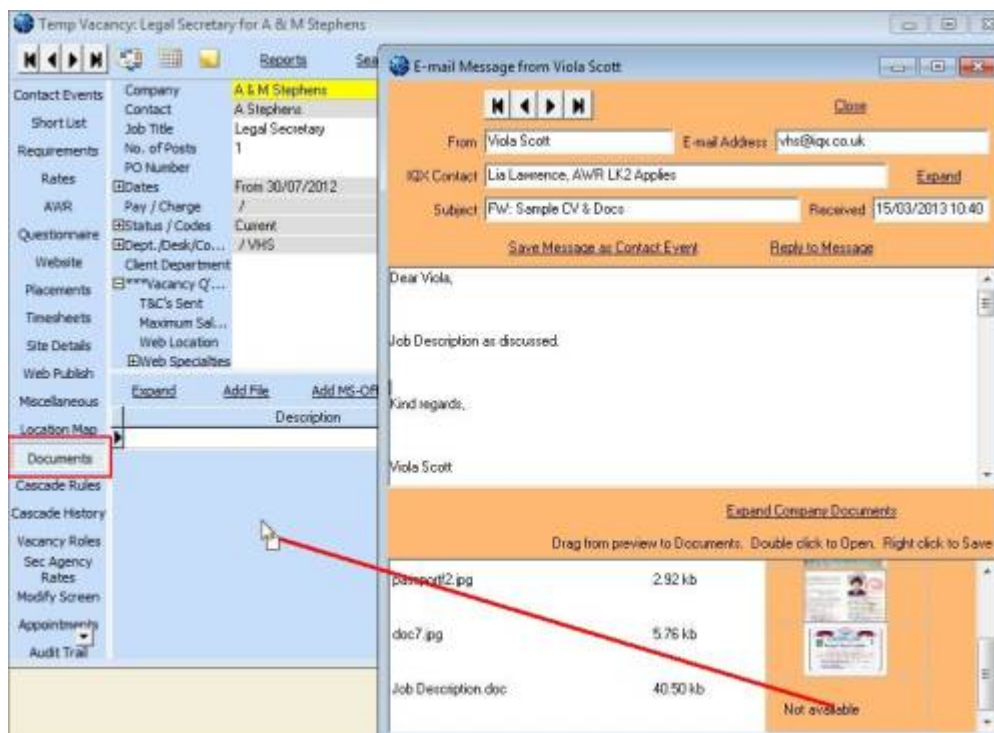
There is a button to expand the Person or Contact Documents view but it is possible to drag to other record Documents view.

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', 'Subject', 'Received', and 'Attachment'. The table lists several emails, including one from 'Viola Scott' with the subject 'Fw: Sample CV & Docs' received on '15/03/2013 10:40'. This email is expanded, showing its details in a pop-up window. The pop-up window has a 'Close' button and fields for 'From' (Viola Scott), 'E-mail Address' (vhs@iqx.co.uk), 'Subject' (Fw: Sample CV & Docs), and 'Received' (15/03/2013 10:40). Below the pop-up window, there is a section titled 'Expand Company Documents' with a button 'Expand'. Below this, there is a list of attachments: 'passport2.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. The background shows a list of other emails with their respective attachment counts.

From	Subject	Received	Attachment
Viola Scott	Lia Lawrence, AWR LK2	15/03/2013 10:40	5
Michael Scott	Michael Scott	15/03/2013 10:22	1
		10:20	4
		10:01	1
		08:59	1
		08:44	2
		15:42	1
		13:59	2
		10:27	3
		17:33	9
		15:07	9
		13:59	8
		13:31	8
		12:54	1
		11:49	1

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.

Please take a look at our Email and Contact Event video: <https://vimeo.com/351642860>

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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=1650293791

Last update: **2022/04/18 14:56**

