



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.



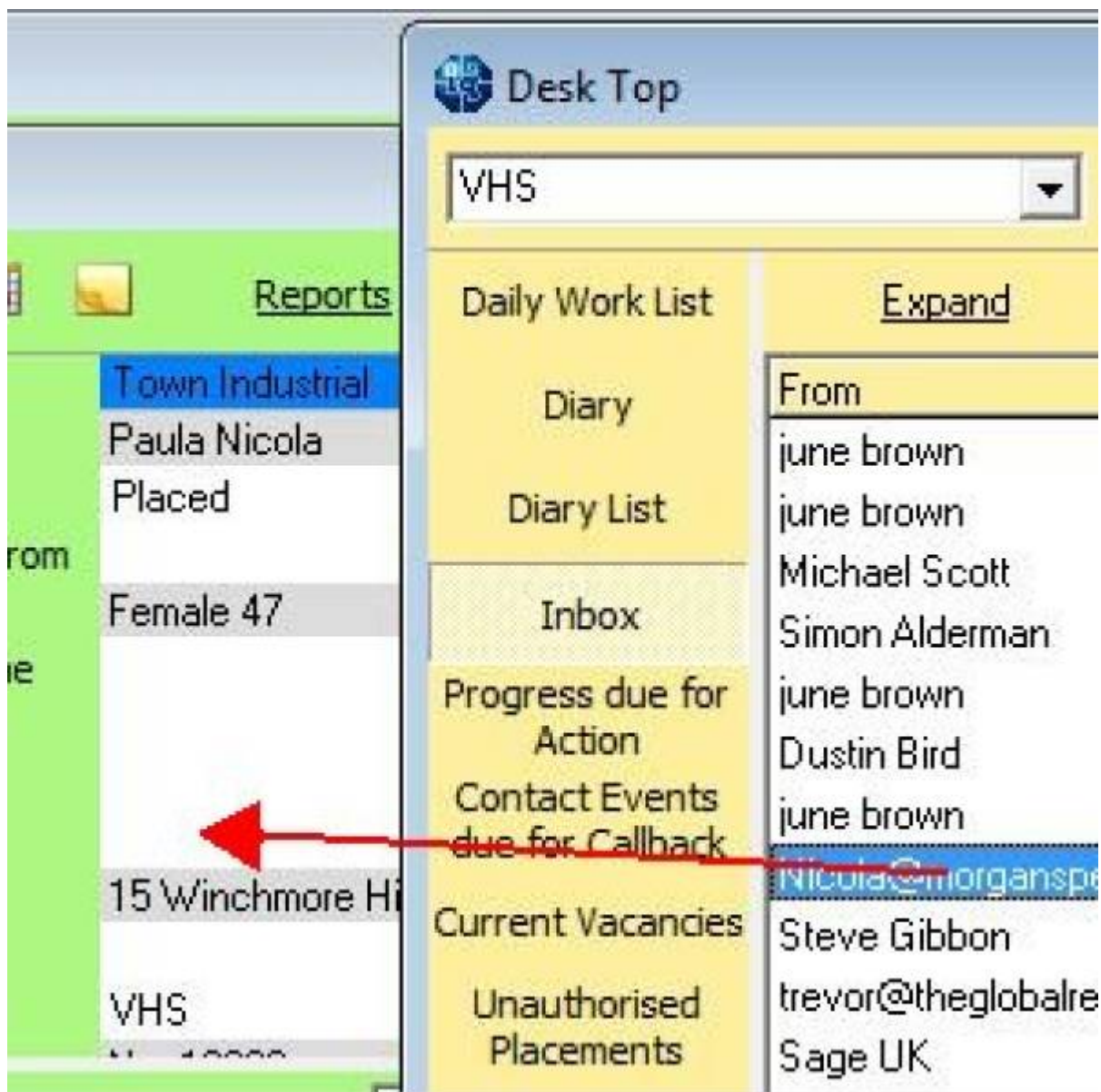
The screenshot shows the iqx software interface. At the top, there is a yellow bar with buttons: 'Expand', 'Save Message as Contact Event', 'Reply to Message', and 'Delete Message'. Below this, a 'Select Contact' dialog box is open. It contains a table with columns: Name, Type, Addr 1, Town, and Postcode. The table lists two contacts: 'Barbara Ryman, The Stationary Shop' (Type: Contact) and 'Barry Ryman' (Type: Person). The first contact is selected. To the right of the table, there is a 'Select' button highlighted with a red box. Above the table, a message is displayed: 'Duplicate Entries exist for "barbara.ryman@hotmail.co.uk"'. The message details include 'From: Barbara Ryman', 'Subject: Test message', and 'Received: 15/04/2014 10:46'.

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 shows the iqx software interface with a 'Temp Vacancy: Legal Secretary for A & M Stephens' record open. The record details include: Company (A & M Stephens), Contact (A Stephens), Job Title (Legal Secretary), No. of Posts (1), PO Number, Dates (From 30/07/2012), Pay / Charge (/), Status / Codes (Current), Dept./Desk/Co... (/VHS), Client Department, and a 'Vacancy Q...' field. To the right, the 'Desk Top' panel is open, showing a list of contacts. A red arrow points from the 'Inbox' section of the 'Desk Top' panel to the 'Legal Secretary' job title in the vacancy record. The 'Inbox' section lists several contacts, including 'june brown', 'Michael Scott', 'Simon Alderman', 'Dustin Bird', and 'Nicola@morganspenc'.

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.

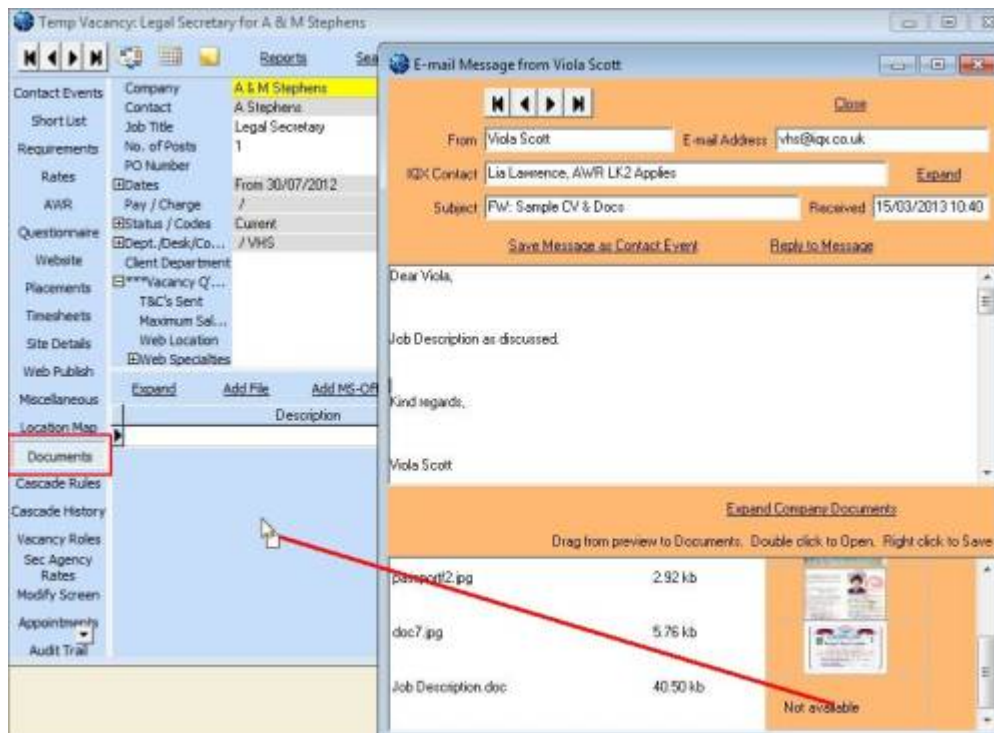
When you **expand** the email the attachments are visible at the bottom.

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 for 'Attachments'. It lists three files: 'passport2.jpg' (2.92 kb), 'doc7.jpg' (5.76 kb), and 'Job Description.doc' (40.50 kb). The 'Job Description.doc' file is highlighted with a red box. To the right of the attachments, there is a 'Not available' button. The interface also shows a 'Drag from preview to Documents. Double click to Open. Right click to Save' instruction.

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=1516272120

Last update: **2018/01/18 10:42**

