

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.

🎲 Demo Accord	I - Viola Scott					- •	×
HAPH	Save and Close Aba	andon <u>Update</u>	N	o Password	Dele	te <u>Help</u>	
Roles	Name Keyname	Demo Accord - Viola Scott SCOTT VIDLA	_	Default Departs Default Tempde		Construction Demo - Events Shift Co 2	^
Layout Settings		VHS		Analysis Code	esik.	C2	
Questionnaire	Job Title	Consultant		Nominal Segme	nt (m		
Division Access	E-Mail Address Short ID	vhs@accorddemo.uk VS		Report View Le Report Print Le		999 999	
Department Maintenance	Template for New Users			Report Export I		999	
Popup Escalations	Not In Use			Combo Box Filte	er		_
opop cocordinationa	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.

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.

2.22.02+ brought some new features to the inbox:

Change Folder - When accessing the Inbox via the Desk Top there is a new button 'Change Folder'. When pressed this will allow the user to select an inbox sub folder to view in the inbox. This folder will be the default for the next time the user goes to the Inbox.





2024/05/19 19:17 2/6	
🧟 Select Email Folder	×
Default	
Deleted Items	
-Inbox	=
Alan Armstrong	\square
BreatheHR	
Calamari	
Clients	
- Diploma Examples	
Dustin Bird	
Euan Taylor	
FreshDesk	
Gareth Johnstone	
GP Strategies	
Hazel Thorburn	
Search	
Ok Cancel	
Select Alternative Message Store Logon using Extended MAPI	

Note: This is NOT available for Users set up for new Exchange Web Services.

Search - When accessing the Inbox via the Desk Top there is a new button 'Search'. Users can type into the box and then hit the search button to return emails related to the search. Please note this does not search on all folders, only the specified folder and the search is not live searching when you enter each letter, it only starts when the button is pressed.

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	acomm				a a	
	Darp Lief 💽	Down	Seve Neesege as Cont	The Local Concerns	Filer on Felchell Records Folder	Search External Valless
	1444	Totan	Reply D	alaa (H N)	Change Folder Goto Default	Search Lipdate
ļ	Progress due for Adam		Frank	IGR Cardeol	Estpel	Received Allachments -

Fetch Limit & Fetched - Fetch Limit and Fetched have been added to the Inbox. This allows users to vary the number of emails that will be 'fetched' from the selected folder (inbox or other selected folder). The Fetched then displays how many emails are being displayed. In the below example the number of emails in the selected folder is lower than the fetch limit, hence the difference in the numbers.

Please note that the maximum you can set the fetch limit to is 200 and it is worth noting that the higher this number is the more time it will take for the emails to load as each one is checked to match IQX records. This overrides the user setting.

👰 Desk Top					_ 🗆 X
SCOTTM	•			🗿 😫 😑 Help	
Diary List	Expand	Message as Contact Event	Fetch Limit Fetched	Filter on Fetched Records Folder	Search External Mailbox
Inbox		Reply Delete	50 12	Change Folder Goto Default	Search Update
Progress due for Action	From	IQX	Contact	Subject	Received Attachments



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.

Diary	From	IQX Contact		Subject		Receiv	/ed
Local y	Barbara Ryman	Barbara Ryman,	The Stationary Sho	o Test message		15/04/	/2014 10:
Diary List	Select Conta	act			~ ·		23
ress due for Action tact Events	Duplicate Entrie	es exist for "barbara.	ryman@hotmail.co	Addr1	Town	Select Help	2
for Callback	Barbara Ryma	n, The Stationary Sh	op Contact		. toronn		
nt Vacancies	Barry Ryman		Person	1 The Avenue		TD1 1DT	

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.

Temp Vaca	ancy: Legal Secretary	y for A & M Stephens	Desk Top			
HAPH		Reports Sear	VHS	•		
Contact Events	Company Contact	A & M Stephens A Stephens	Daily Work List	Expand	Save Message as (Contact Event
Short List	Job Title	Legal Secretary	Diary	From	IQX Contact	Subject
Requirements	No. of Posts	1	onur y	june brown	No. of Contraction of Contraction	RE: BCL Leg
Rates	PO Number Dates	From 30/07/2012	Diary List	june brown Michael Scott	Michael Scott	RE: BCL Leg RE: BCL Leg
AWR	Pay / Charge	1	Inbox	Simon Alderman	Simon Alderman	RE: Tempde
Questionnaire	EStatus / Codes	Current	Progress due for	une brown		RE BOLLE
Website	EDept./Desk/Co Client Department E***Vacancy Q'	ZVHS	Action Contact Events due for Callback	Dustin Bird june brown Nicola@morganspe	Sian Monique Binks	Concept Car BCL Legal 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.



		🚱 Desk Top	
		VHS	•
	<u>Reports</u>	Daily Work List	<u>Expand</u>
	Town Industrial Paula Nicola	Diary	From
	Placed	Diary List	june brown june brown
rom	Female 47	Inbox	Michael Scott Simon Alderman
e		Progress due for Action	june brown Dustin Bird
	-	Contact Events	june brown
	15 Winchmore Hi	Current Vacancies	Steve Gibbon
	VHS	Unauthorised Placements	trevor@theglobalre Sage UK



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

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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.

Expand	Save Message	as Contact Event	Reply to Mess	<u>age</u>	Delet	e Message
From	IQX Contact	Subject		Received		Allachmer
Mola Scott	Lia Lawrence, AWR	LK2 FW: Sample C	V & Dace	15/03/2013	10.40	-15
Michael Scott	Michael Scott	RF Tempded	this view the details see.	15/03/2013		
E-mail Me	essage from Viola Scott				10:20	4
	and any long long		14		10:01	1
	HAPH		Close		D8:59 D8:44	1
From	Viola Scott	E-mai Ad	dress vhs@iqx.co.uk		15:42	2 1 2 3
and the second second	and the second design of the s	1000	PROP - COLUMN	Arganetary.	13:59	2
IQX Contact	Lia Lawrence, AWR LK	2 Apples		Expand	10:27	3
Subject	Fw! Sample CV & Docs		Received 15	/03/2013 10:40	7:33	
			Ing the comparison		15:07	9
	Save Message as C	ionlact Event	Beoly to Message		13:59	
Dear Viola,					13:31	8
					11:49	1
Job Description	n as discussed.					
Viola Scott						
-	Drag from pr		opand Company Document	ight click to Save		
 passport/2.jpg 		2.92 kb	20			
doc7.jpg		5.76 kb	280			
Job Description	n.doc	40.50 kb	Not available			

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



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Inbox and Contact Events

HAPH	C. PARTY AND A CONTRACTOR	Reports A & M Stephens	500 🎯 E-mail Me	ssage from Viola Scott			
Contact Events Short Ust	Company Contact	A Stephene		HAPH		Close	
Requirements	Job Title No. of Posts	Legal Secretary 1	From	Viola Scott	E-mail Addre	tt vhs@iqc.co.uk	
Rates	PO Number EDates	From 30/07/2012	RDK Contact	Lis Lawrence, AWR LK2 Ap	plies		Expand
AWR	Pay / Charge	1	Subject	FW: Sample CV & Doce		Received	5/03/2013 10:40
Questionnare	ElStatus / Codes EDept./Desk/Co	Culterit / VHS		Save Message as Conta	ct Every!	Beply to Message	
Website Placements Timesheets	Clent Department B****Vacancy Q' TBC's Sent		Dear Viola,			- Internet and the	, E
10000000000	Maximum Sal		a service service of				
Site Details Web Publish	Web Location EWeb Specialties		Job Description	an discussed.			
Stresson C.	EWeb Specialities	<u>dd File Add M</u> Description		as discussed.			
Web Publish Miscellaneous Location Map Documenta	EWeb Specialities	dd File Add M	5-09	as discussed.			
Web Publish Miscellaneous Location Map Documents Cascade Rules Cascade History Vacancy Roles	EWeb Specialities	dd File Add M	S-OF Kind regards,		1.1	nd Company Docume	
Web Publish Miscellaneous Location Map Documents Cascade Rules Cascade History	EWeb Specialities	dd File Add M Description	S-OF Kind regards,	Drag from preview	1.1		
Web Publish Miscellaneous Location Man Documents Cascade Rules Cascade History Vacancy Roles Sec Agency Rates	EWeb Specialities	dd File Add M Description	S-OP Kind regards, Viole Scott	Drag from preview	v to Documents, B	Double click to Open.	

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

Back to Hints, Tips and Shortcuts

