







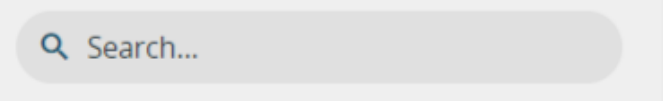
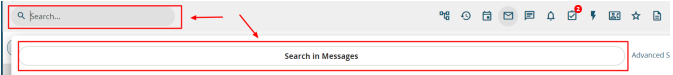




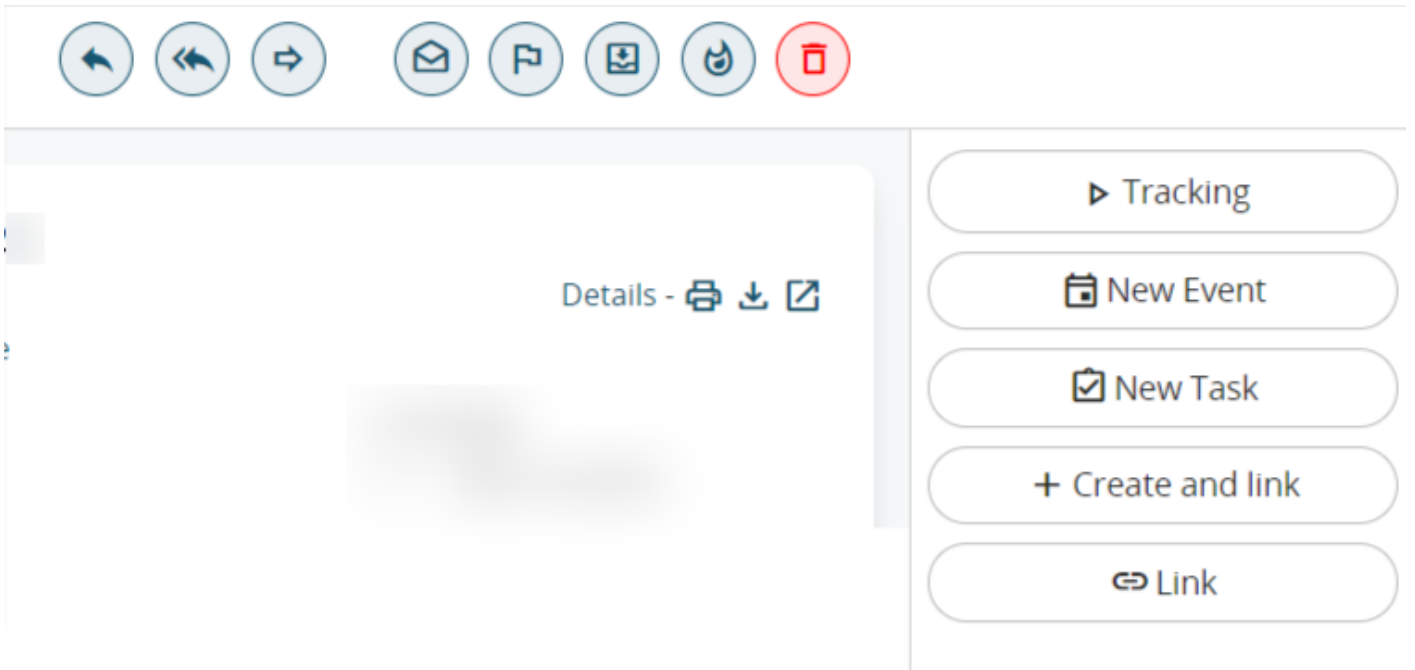


5.2.3 Email Functions

	<p>Compose a new email.</p>
	<p>Download emails from the email server</p>
	<p>Messages module settings (user's personal settings)</p>
	<p>Mark message as read/unread</p>
	<p>Mark message as important</p>
	<p>Move email to another folder</p>
	<p>Mark as spam (the email is moved to the Spam Folder)</p>
	<p>Delete email (the email is moved to the bin)</p>
	 <p>Search in emails (simple and advanced)</p>
<p>Create Event/to-dos</p>	<p>Create calendar activity from the email</p>
<p>Link</p>	<p>Link the email to an object in vtenext</p>
<p>Translate</p>	<p>Open Google Translate for instant translation of the body of the email</p>
<p>Download attachments</p>	<p>Download a single zip file containing the attachments, if more than one</p>
	<p>Download attachment</p>
	<p>File attachment as a CRM document / View document tab</p>
	<p>Link document to an object in vtenext</p>

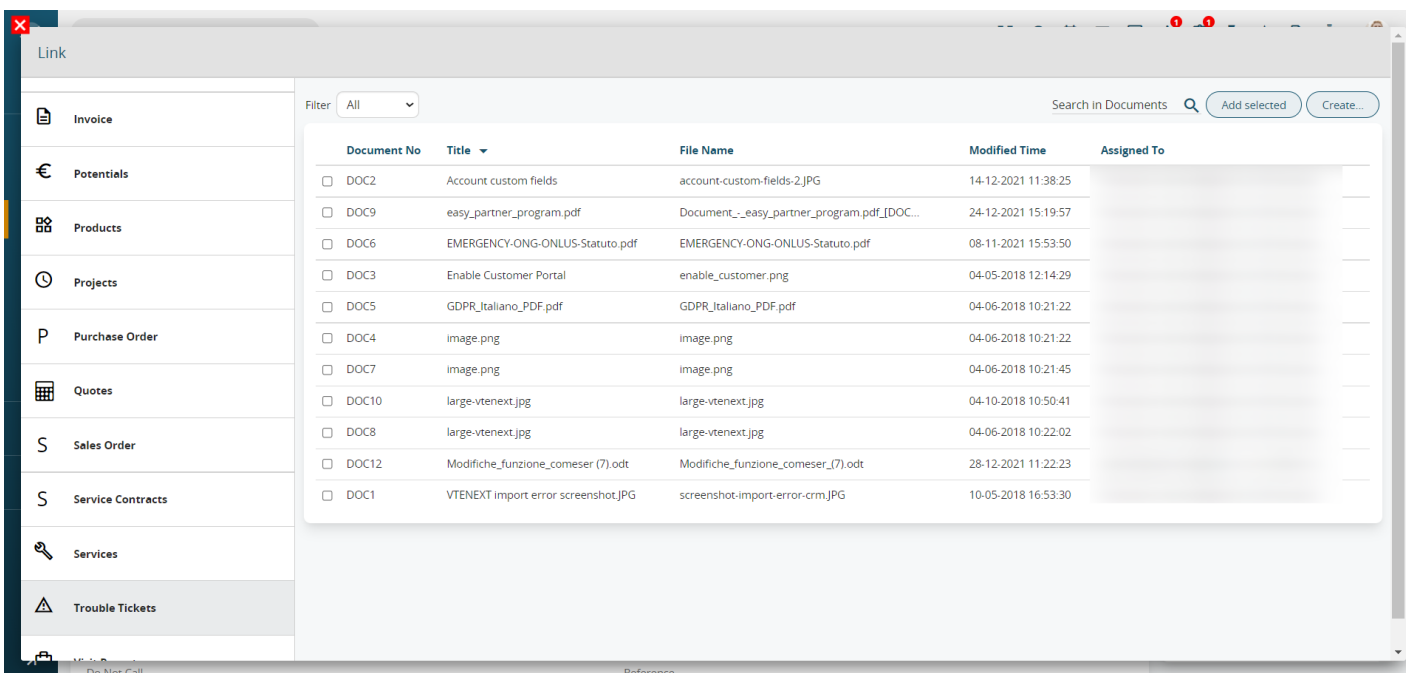
	Open attachment preview (supported extensions: odt, pdf and common image formats)
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Emails can be linked to CRM modules by means of the Link function:



The screenshot shows an email interface. At the top, there is a toolbar with several circular icons: a back arrow, a forward arrow, an envelope, a flag, a download arrow, a refresh arrow, and a trash can. Below the toolbar, the main content area is mostly blurred, but the text "Details -" followed by print, download, and share icons is visible. On the right side, there is a vertical sidebar with five rounded rectangular buttons: "▶ Tracking", "📅 New Event", "📌 New Task", "+ Create and link", and "🔗 Link".

Through the “Link” function it is possible to relate the emails to the CRM modules:





The screenshot shows a "Link" dialog box in a CRM system. On the left, there is a sidebar with a list of CRM modules: Invoice, Potentials, Products, Projects, Purchase Order, Quotes, Sales Order, Service Contracts, Services, and Trouble Tickets. The main area of the dialog box contains a table of documents. At the top of the table, there is a "Filter" dropdown set to "All" and a search bar labeled "Search in Documents". To the right of the search bar are buttons for "Add selected" and "Create...".



Document No	Title	File Name	Modified Time	Assigned To
<input type="checkbox"/> DOC2	Account custom fields	account-custom-fields-2.JPG	14-12-2021 11:38:25	
<input type="checkbox"/> DOC9	easy_partner_program.pdf	Document_-_easy_partner_program.pdf_[DOC...	24-12-2021 15:19:57	
<input type="checkbox"/> DOC6	EMERGENCY-ONG-ONLUS-Statuto.pdf	EMERGENCY-ONG-ONLUS-Statuto.pdf	08-11-2021 15:53:50	
<input type="checkbox"/> DOC3	Enable Customer Portal	enable_customer.png	04-05-2018 12:14:29	
<input type="checkbox"/> DOC5	GDPR_Italiano_PDF.pdf	GDPR_Italiano_PDF.pdf	04-06-2018 10:21:22	
<input type="checkbox"/> DOC4	image.png	image.png	04-06-2018 10:21:22	
<input type="checkbox"/> DOC7	image.png	image.png	04-06-2018 10:21:45	
<input type="checkbox"/> DOC10	large-vtenext.jpg	large-vtenext.jpg	04-10-2018 10:50:41	
<input type="checkbox"/> DOC8	large-vtenext.jpg	large-vtenext.jpg	04-06-2018 10:22:02	
<input type="checkbox"/> DOC12	Modifiche_funzione_comeser (7).odt	Modifiche_funzione_comeser_(7).odt	28-12-2021 11:22:23	
<input type="checkbox"/> DOC1	VTENEXT import error screenshot.JPG	screenshot-import-error-crm.JPG	10-05-2018 16:53:30	


The system suggests possible links automatically based on the sender's email address. You can edit the “Filter” item to extend to search also to include results beyond the suggested ones. The “Recents” button, which is accessible from the “create and link” function, allows you to access the modules most recently visited.




If you can't find a match with an existing element, you can create a new record (for example a new account) by means of the "Create" button.


Once the connection has been made, it will be highlighted with the symbol , which will be visible both in the email list view and in the email detail with an indication of the linked record.

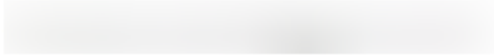


ils -  



- ▶ Tracking
-  New Event
-  New Task
- + Create and link
-  Link

 **EDFG Group Limited**

Assigned To 

Website www.edfggrouplimited.com

Phone (150) 009-5971

Industry Chemicals

Rating Active

Type --None--

Lock Automatic Emails NO

Billing Address 999 Baker Way

Shipping Address 999 Baker Way

Billing City Sunnyvale

Shipping City Sunnyvale

Billing State CA

Shipping State CA

Billing Postal Code 23617

Shipping Postal Code 23617

Billing Country USA

Shipping Country USA

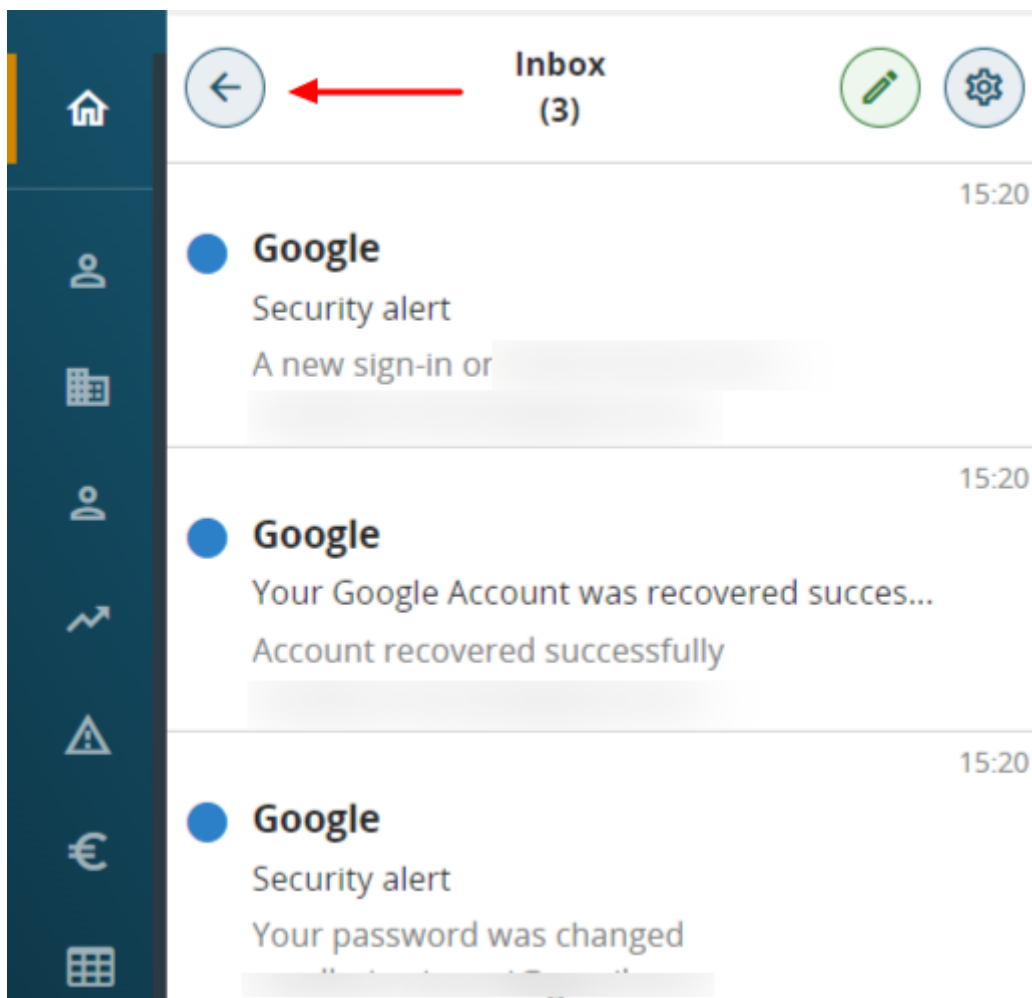
Email test123@test123.com

Linked emails will be also visible in the records, via Relations > Messages. Visibility of emails is subject to the Sharing Access configuration (Linked Messages module item).

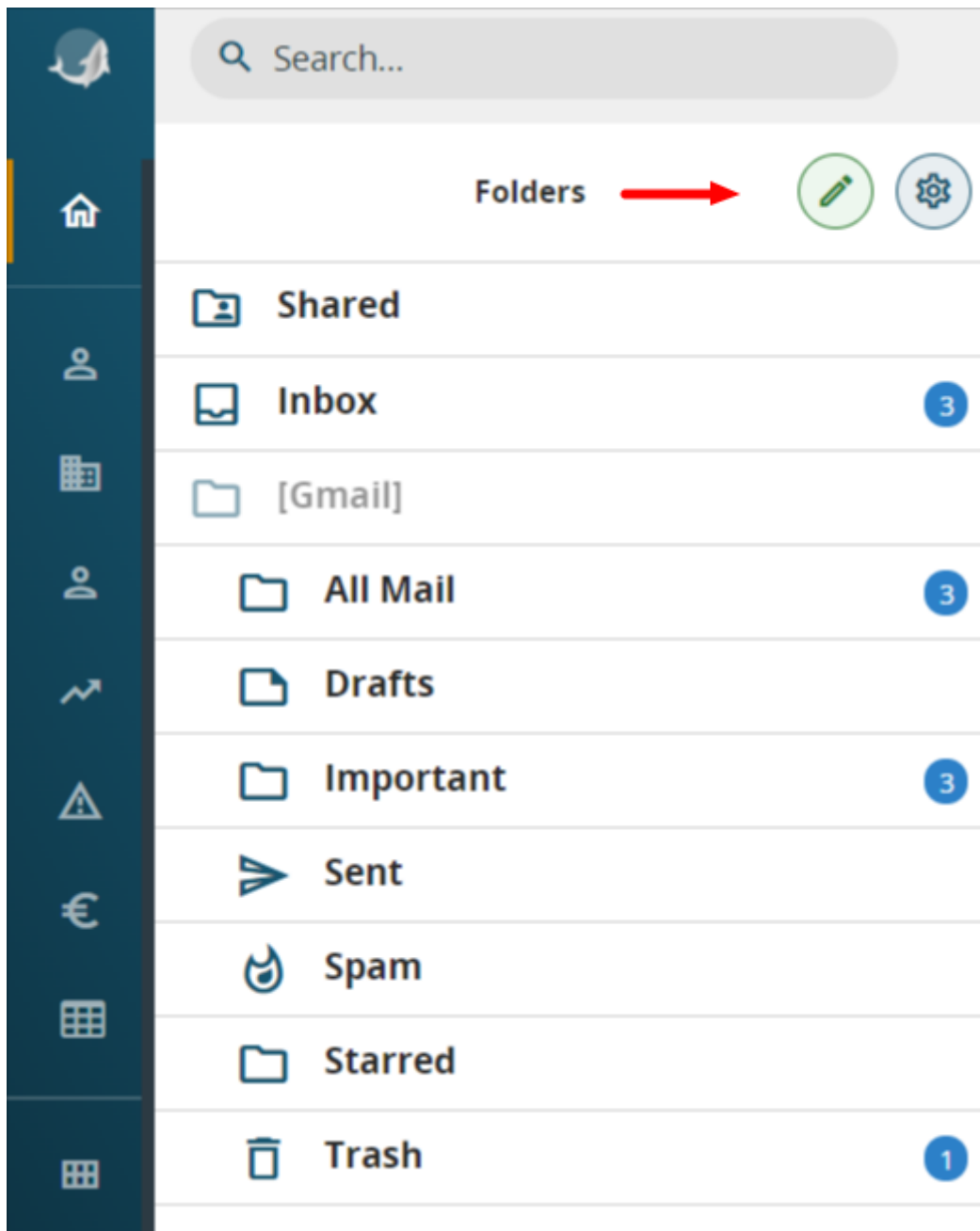
Mark all emails as read.

To mark all emails as read, it is essential to follow these simple steps:

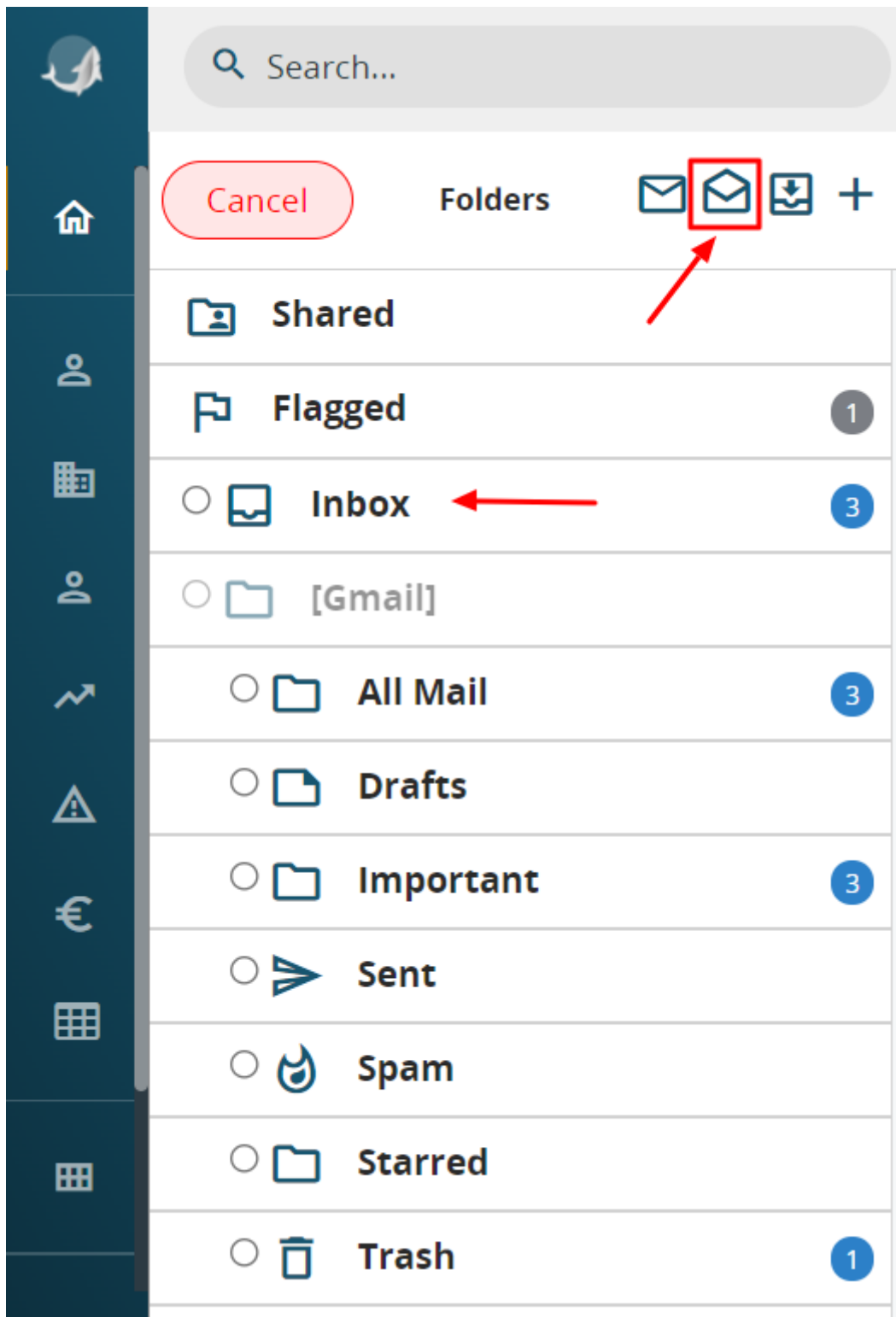
1. From the left column of the Messages module, click on BOXES / FOLDERS as shown in the image below.



2. Click on MODIFY as shown in the image.



3. Finally select the FOLDER where the emails you want to mark as ALL LETTE are located and click on the SIGN AS READ icon, as shown in the image below.



Revision #1

Created 2022-05-25 17:25:50 UTC by Alberto

Updated 2022-06-06 12:30:15 UTC by Alberto