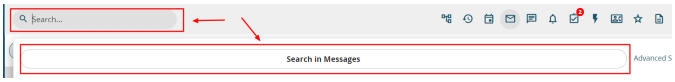
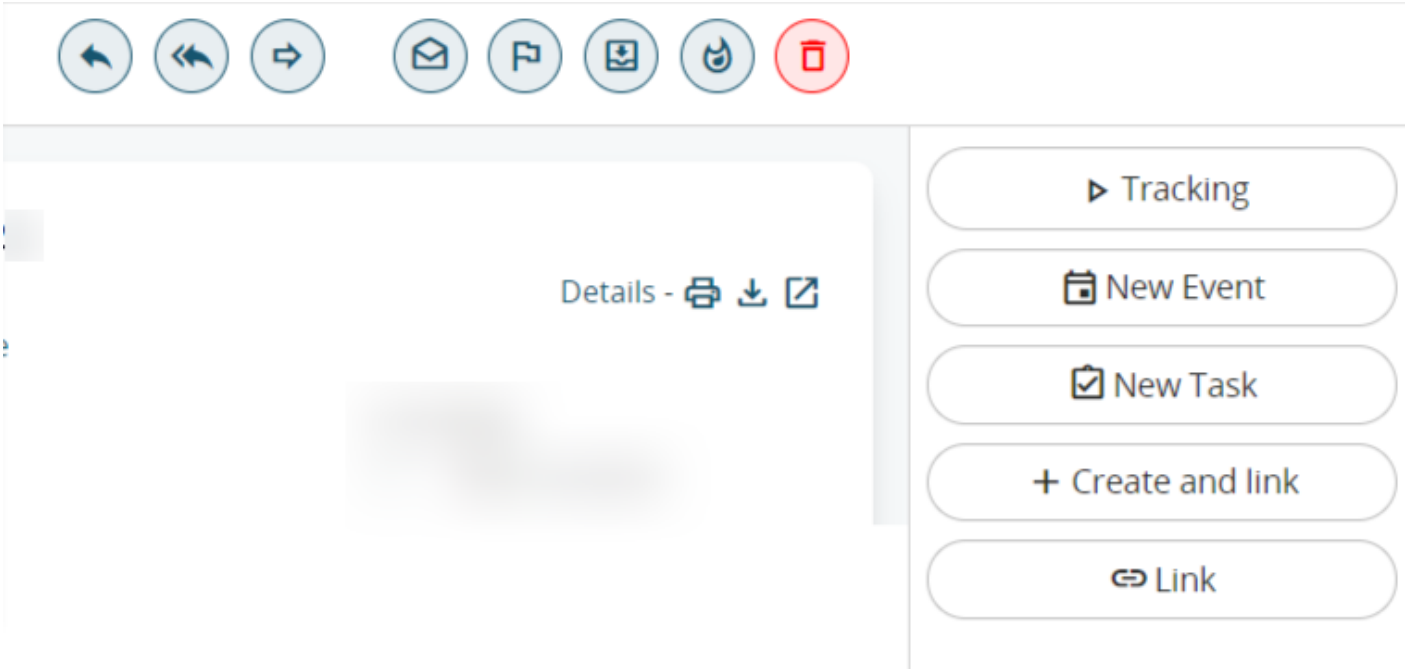
5.2.3 Email Functions

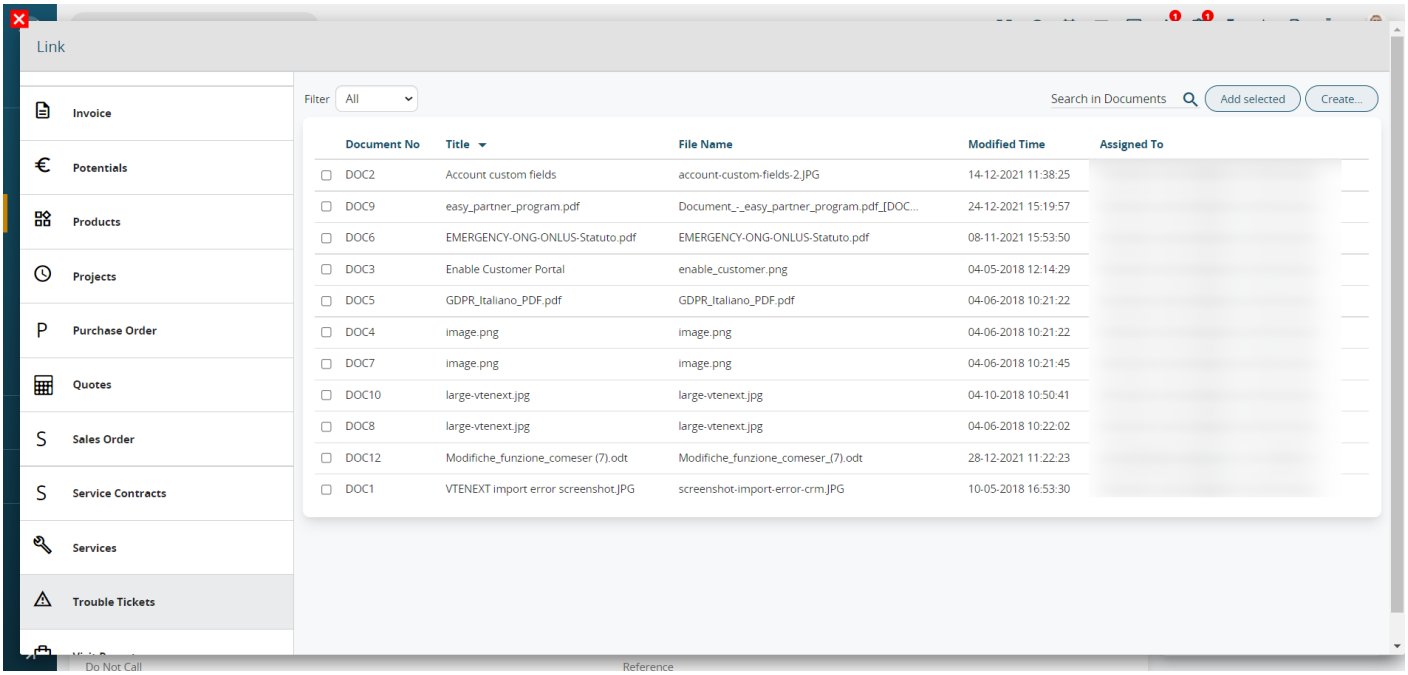
	Compose a new email.
	Download emails from the email server
	Messages module settings (user's personal settings)
	Mark message as read/unread
	Mark message as important
	Move email to another folder
	Mark as spam (the email is moved to the Spam Folder)
	Delete email (the email is moved to the bin)
	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

	Open attachment preview (supported extensions: odt, pdf and common image formats)

Emails can be linked to CRM modules by means of the Link function:



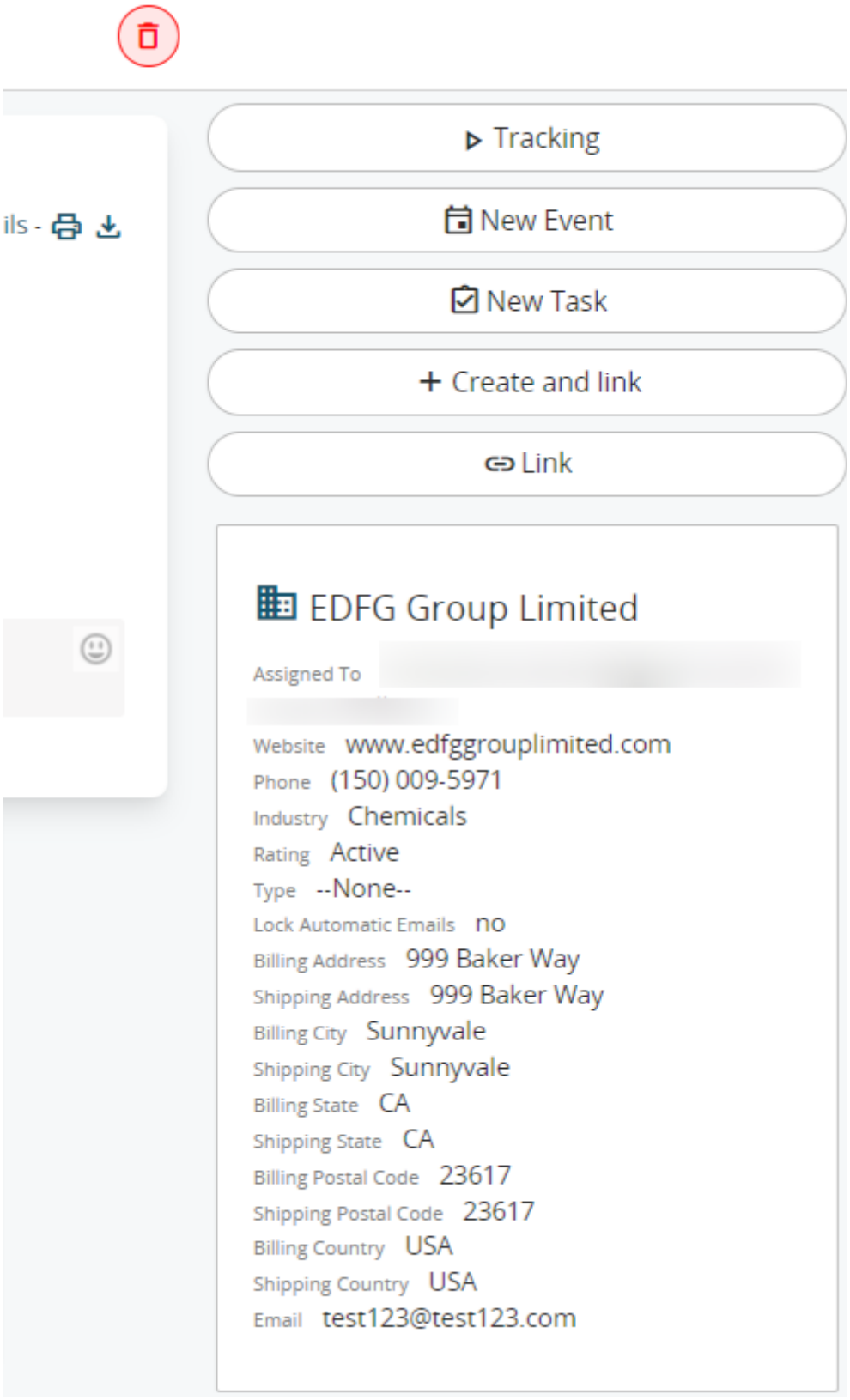
Through the “Link” function it is possible to relate the emails to the CRM modules:



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.

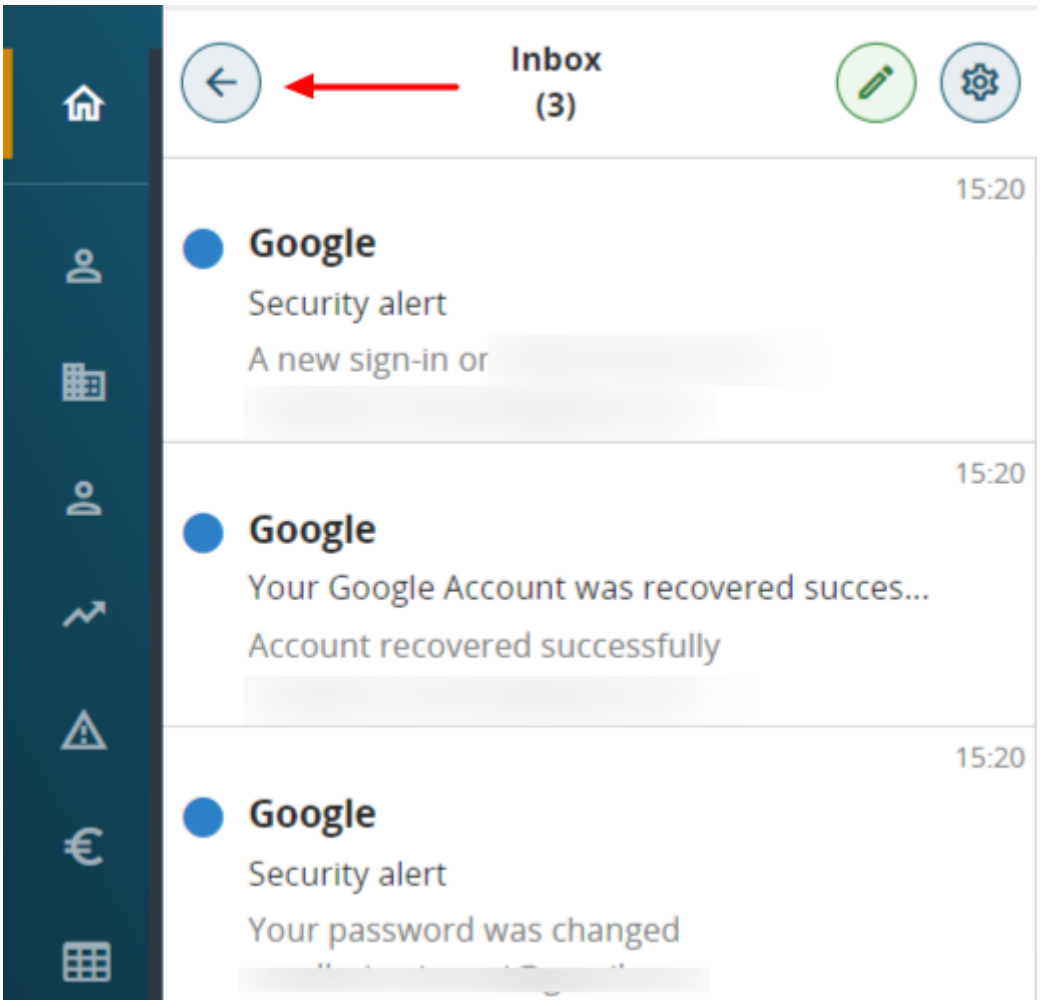


Linked emails will be also visible in the records, via Relations > Messages. Visibility of emails is subject to the Sharing Access configuration (Linked Messages module item).

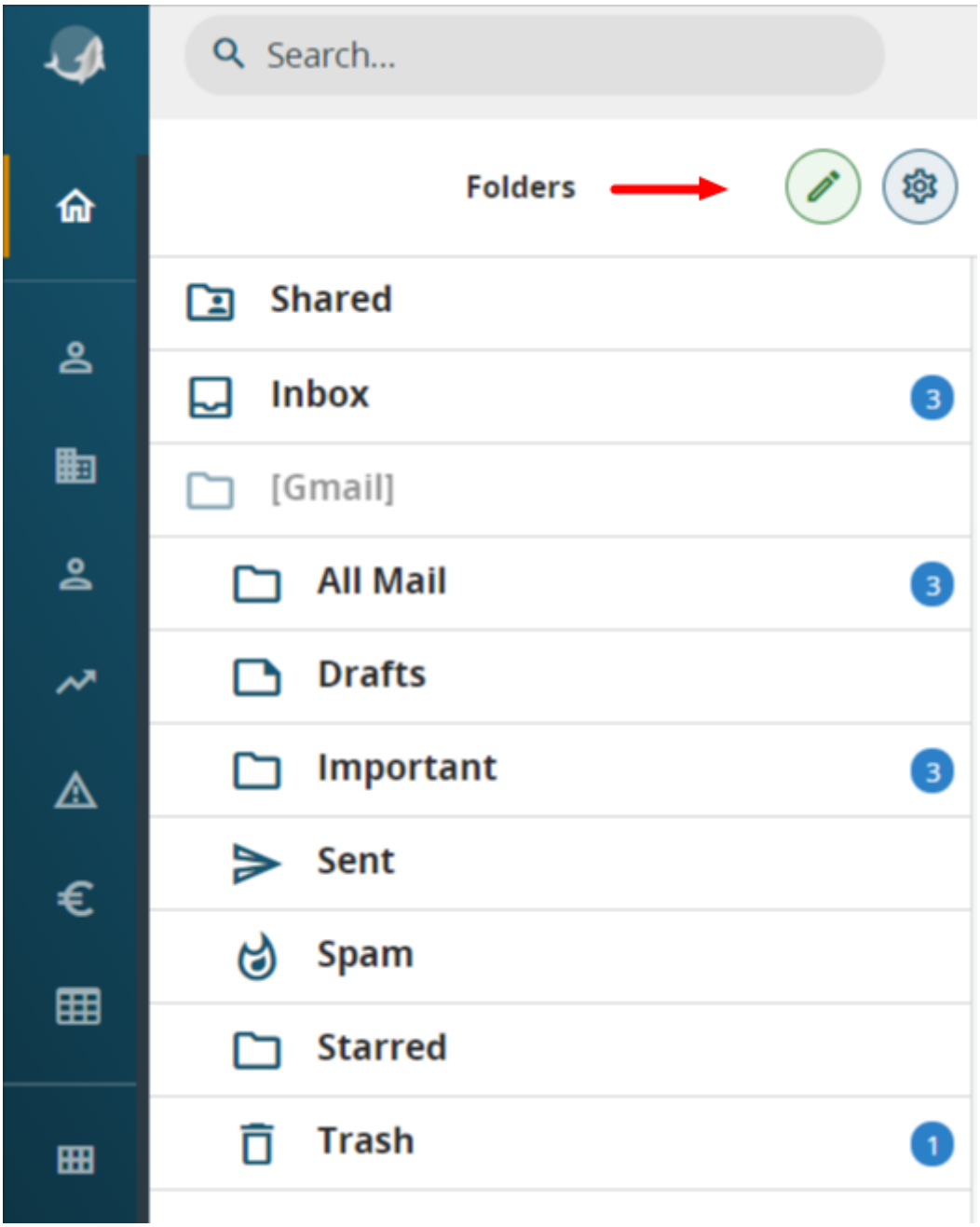
Mark all emails as read.

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

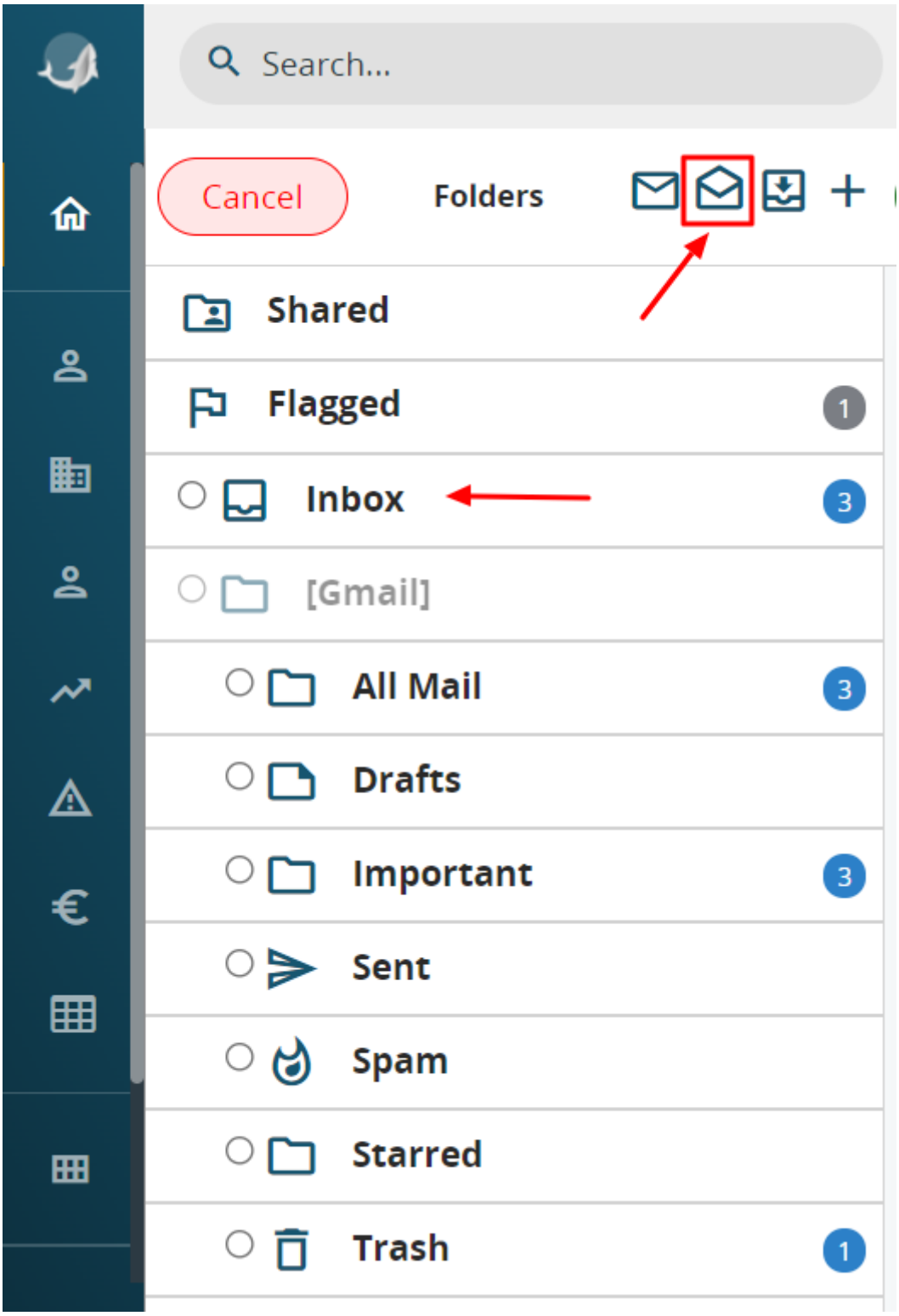
1. From the left column of the Messages module, click on BOXES / FOLDERS as shown in the image below.



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