

Email Management

16 Steps

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Created by

Johann Goree

Creation Date

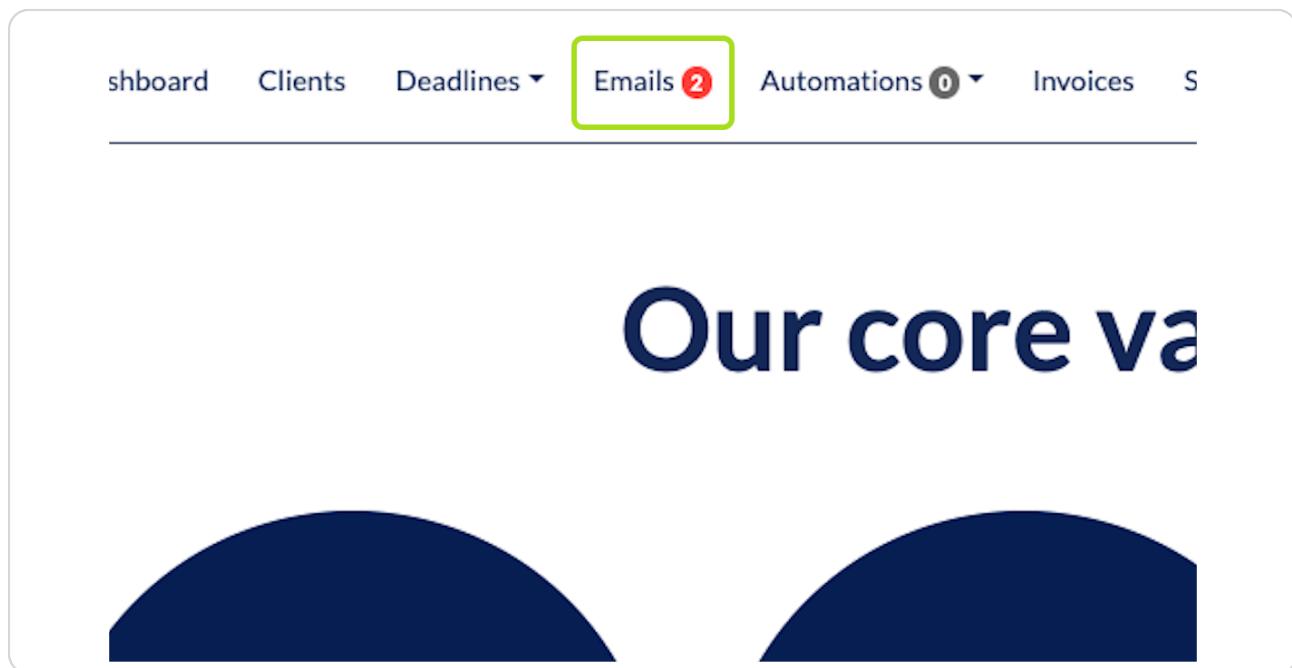
June 3, 2023

Last Updated

June 3, 2023

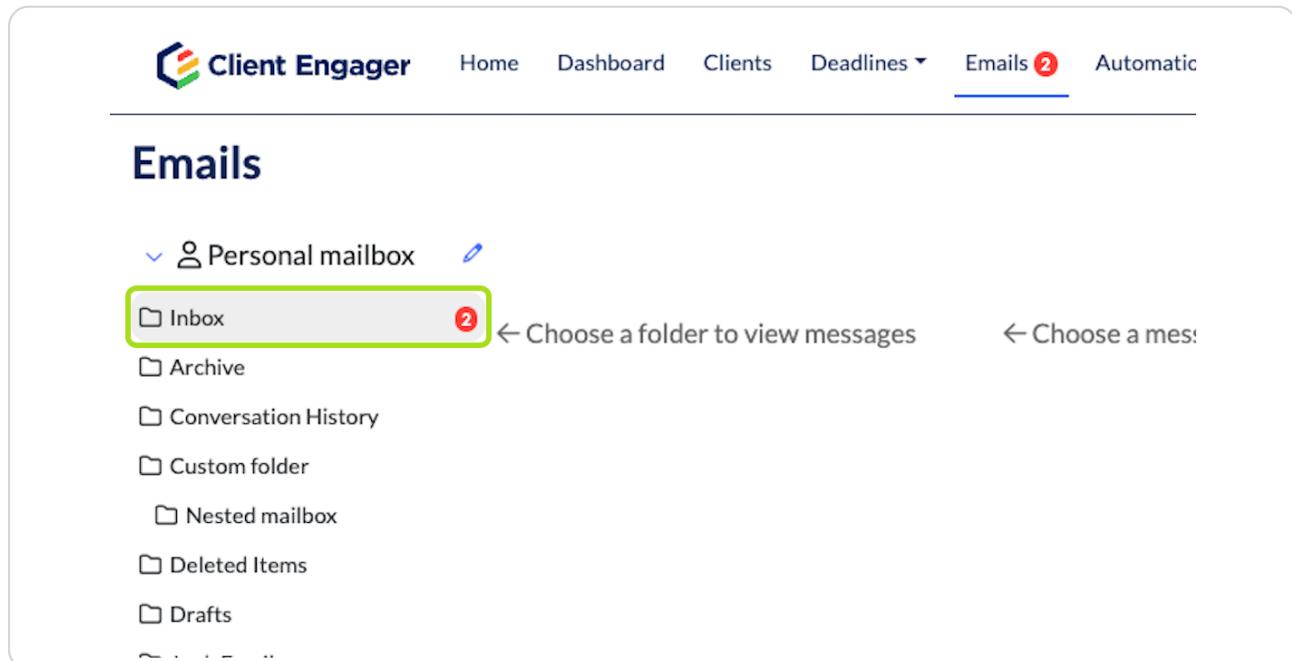
STEP 1

Click on Emails



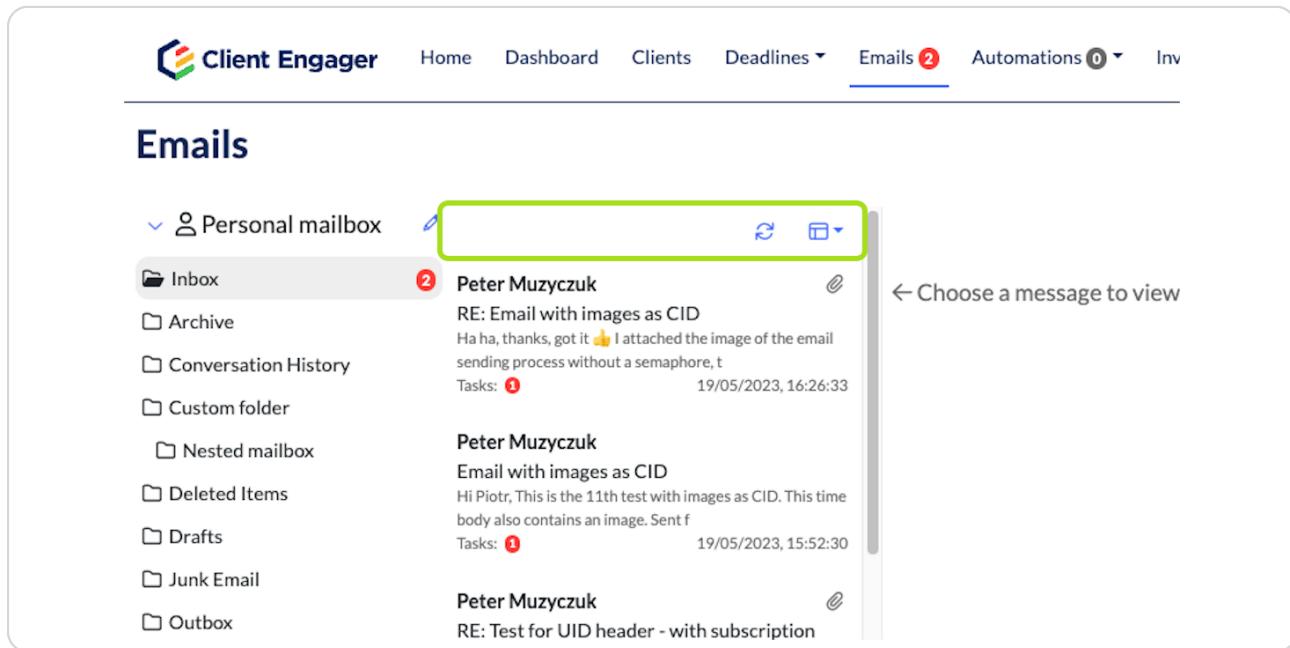
STEP 2

Click on Inbox...



STEP 3

here you can refresh your inbox but this should happen automatically. You can also click the square icon to select what info you see in this column



Client Engager Home Dashboard Clients Deadlines Emails 2 Automations 0 Inv

Emails

Personal mailbox

Inbox (2) Peter Muzyczuk RE: Email with images as CID
Ha ha, thanks, got it! I attached the image of the email sending process without a semaphore, t
Tasks: 1 19/05/2023, 16:26:33

Conversation History Peter Muzyczuk Email with images as CID
Hi Piotr, This is the 11th test with images as CID. This time body also contains an image. Sent f
Tasks: 1 19/05/2023, 15:52:30

Custom folder

Nested mailbox

Deleted Items

Drafts

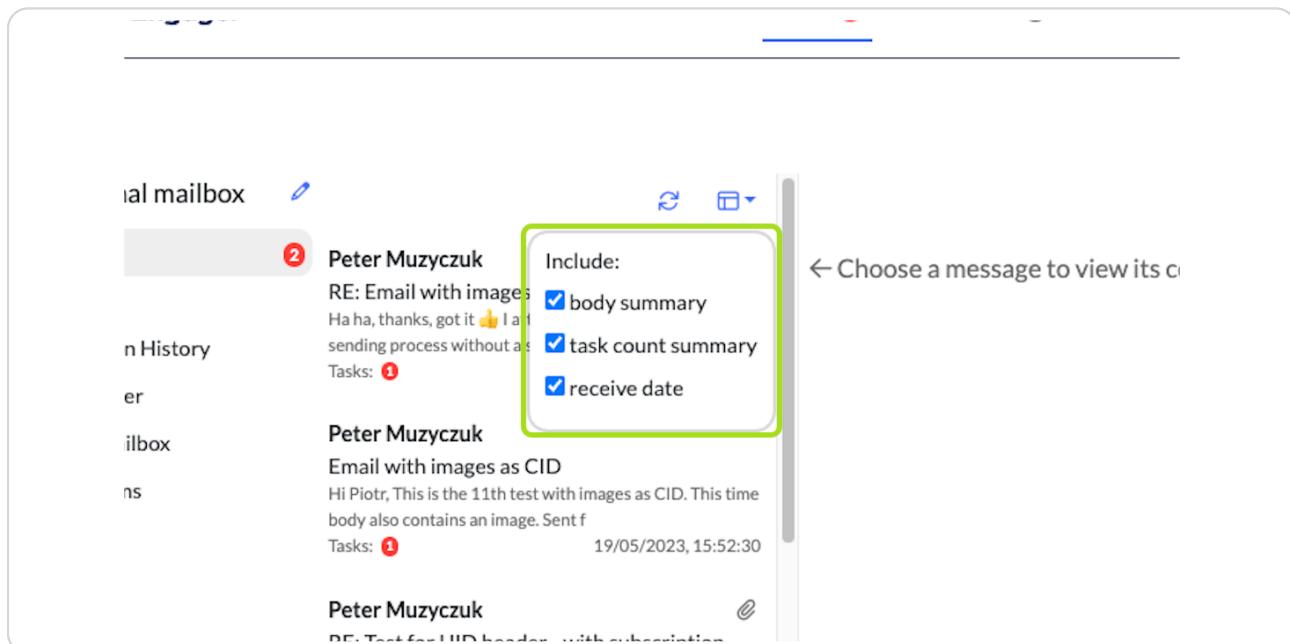
Junk Email

Outbox

Choose a message to view

STEP 4

You can choose to hide or show body summary, task count and receive date



Personal mailbox

Inbox (2) Peter Muzyczuk RE: Email with images as CID
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Tasks: 1

Conversation History Peter Muzyczuk Email with images as CID
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Custom folder

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Deleted Items

Drafts

Junk Email

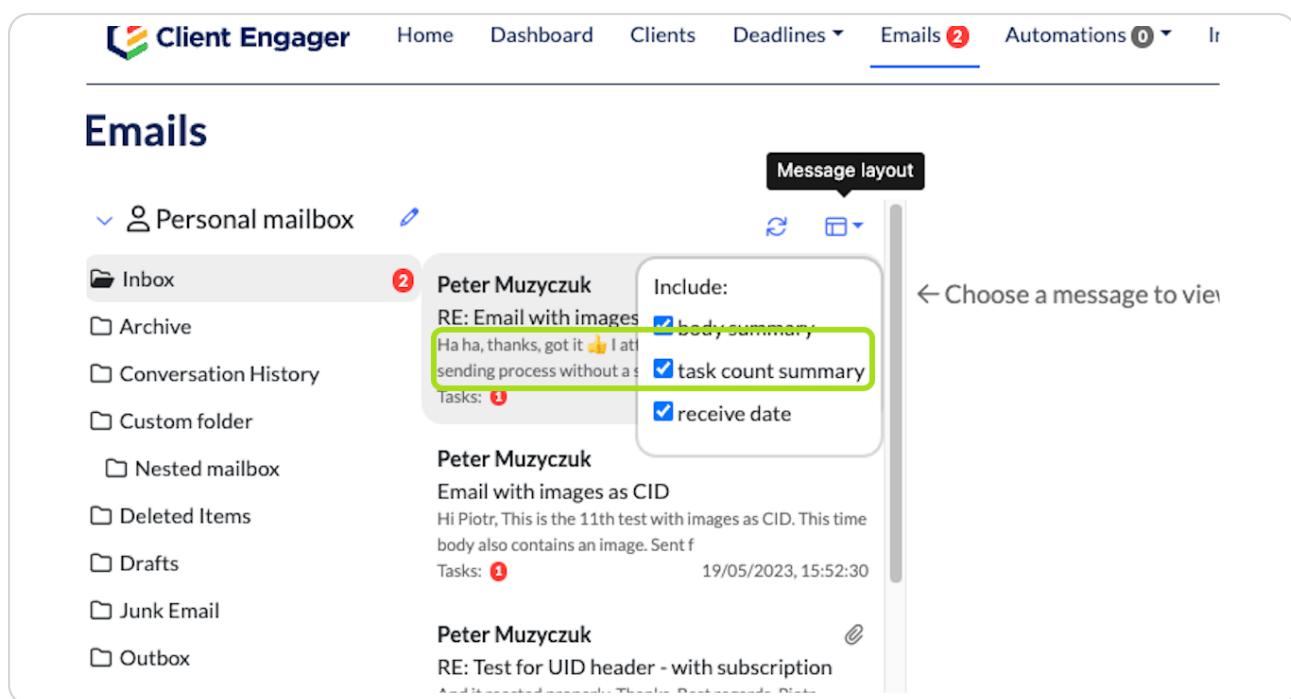
Outbox

Include:
 body summary
 task count summary
 receive date

Choose a message to view its content

STEP 5

To view and reply to emails etc click on the email you want to read or action



Client Engager Home Dashboard Clients Deadlines Emails 2 Automations 0

Emails

Personal mailbox

- Inbox (2)
- Archive
- Conversation History
- Custom folder
- Nested mailbox
- Deleted Items
- Drafts
- Junk Email
- Outbox

Peter Muzyczuk
RE: Email with images
Ha ha, thanks, got it! I am sending process without a s
Tasks: 1

Peter Muzyczuk
Email with images as CID
Hi Piotr, This is the 11th test with images as CID. This time body also contains an image. Sent f
Tasks: 1 19/05/2023, 15:52:30

Peter Muzyczuk
RE: Test for UID header - with subscription

Message layout

Include:

- body summary
- task count summary
- receive date

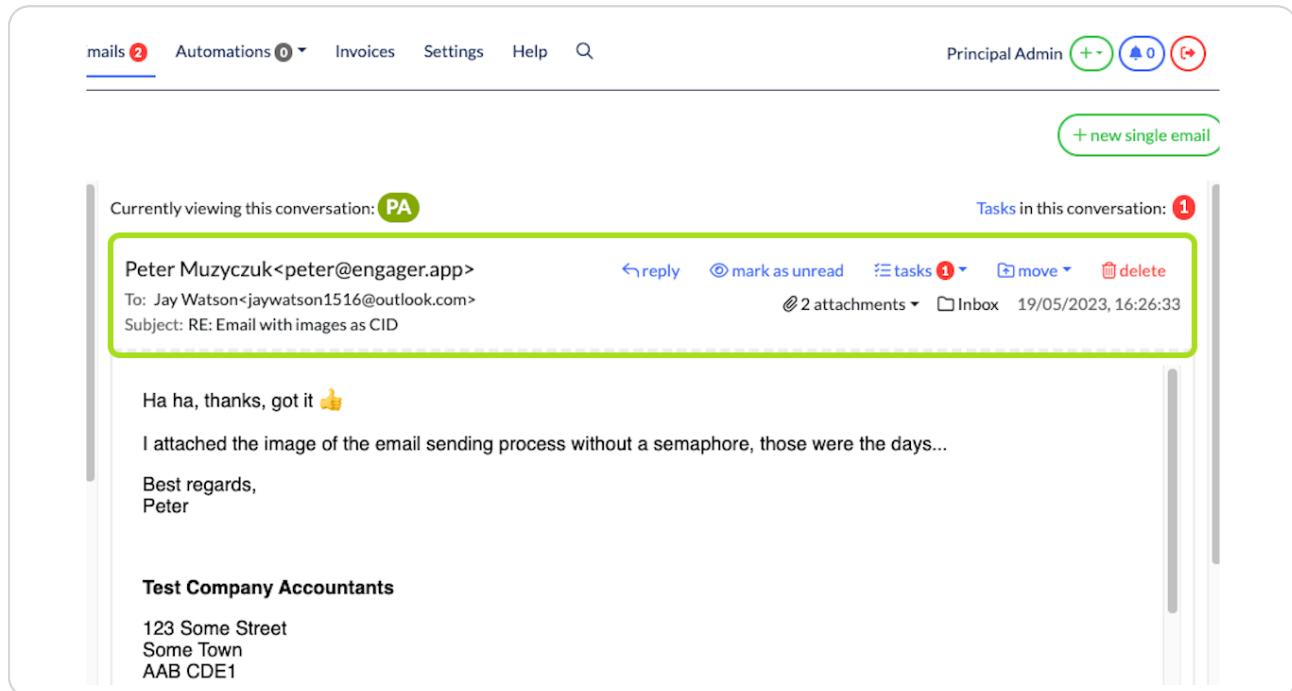
← Choose a message to view

STEP 6

Top menu...

Here you can view standard email details, dates, subject and sender etc

You can reply, mark as read, see if you have any tasks against this email, move the email to a folder in your email inbox, delete the email, and see attachments



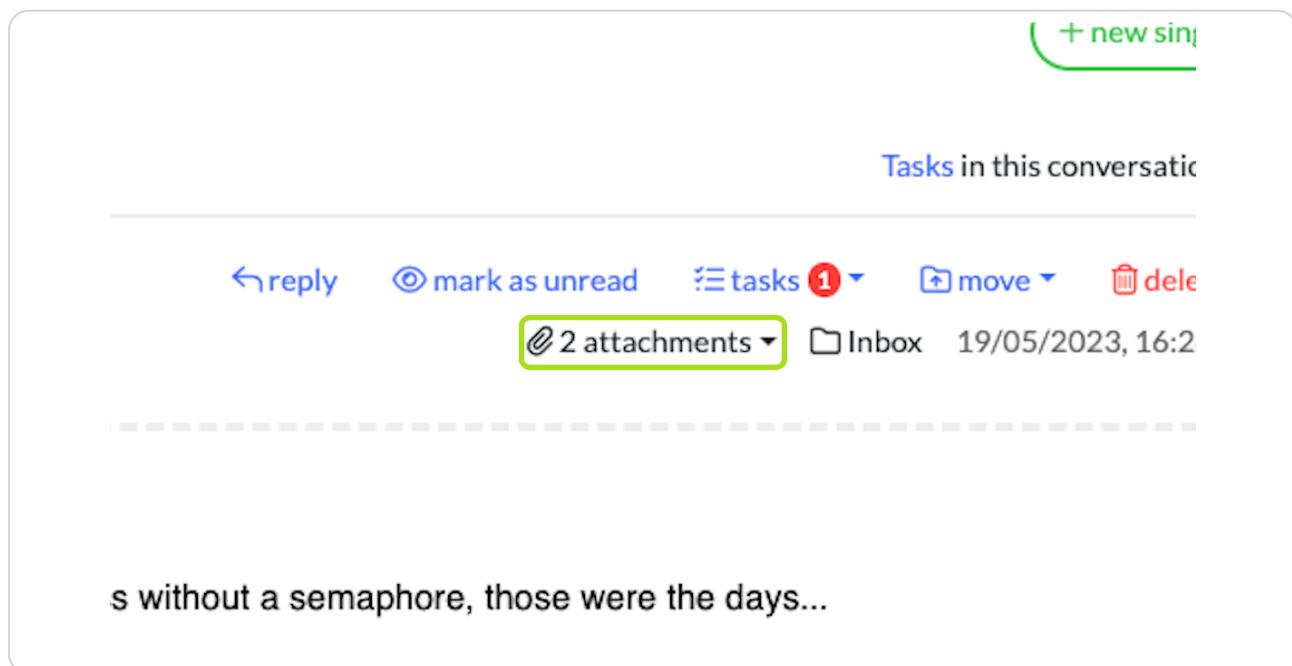
The screenshot shows a web-based email application interface. At the top, there is a navigation bar with links for 'mails' (2), 'Automations' (0), 'Invoices', 'Settings', 'Help', and a search bar. On the right side of the top bar, there is a user profile for 'Principal Admin' with icons for notifications (0) and a refresh/circular arrow. Below the top bar, there is a green button labeled '+ new single email'.

Underneath the top bar, the main content area shows a conversation. It starts with a header: 'Currently viewing this conversation: PA' and 'Tasks in this conversation: 1'. The conversation itself is highlighted with a green border. It shows an email from 'Peter Muzyczuk <peter@engager.app>' to 'Jay Watson <jaywatson1516@outlook.com>' with the subject 'RE: Email with images as CID'. The email content includes the text 'Ha ha, thanks, got it 🙌' and 'I attached the image of the email sending process without a semaphore, those were the days...'. Below the email, there are standard email interaction buttons: reply, mark as unread, tasks (1), move, and delete. It also shows '2 attachments' and the date '19/05/2023, 16:26:33'. The message is from 'Inbox'.

At the bottom of the conversation area, there is a section for 'Test Company Accountants' with the address '123 Some Street, Some Town, AAB CDE1'.

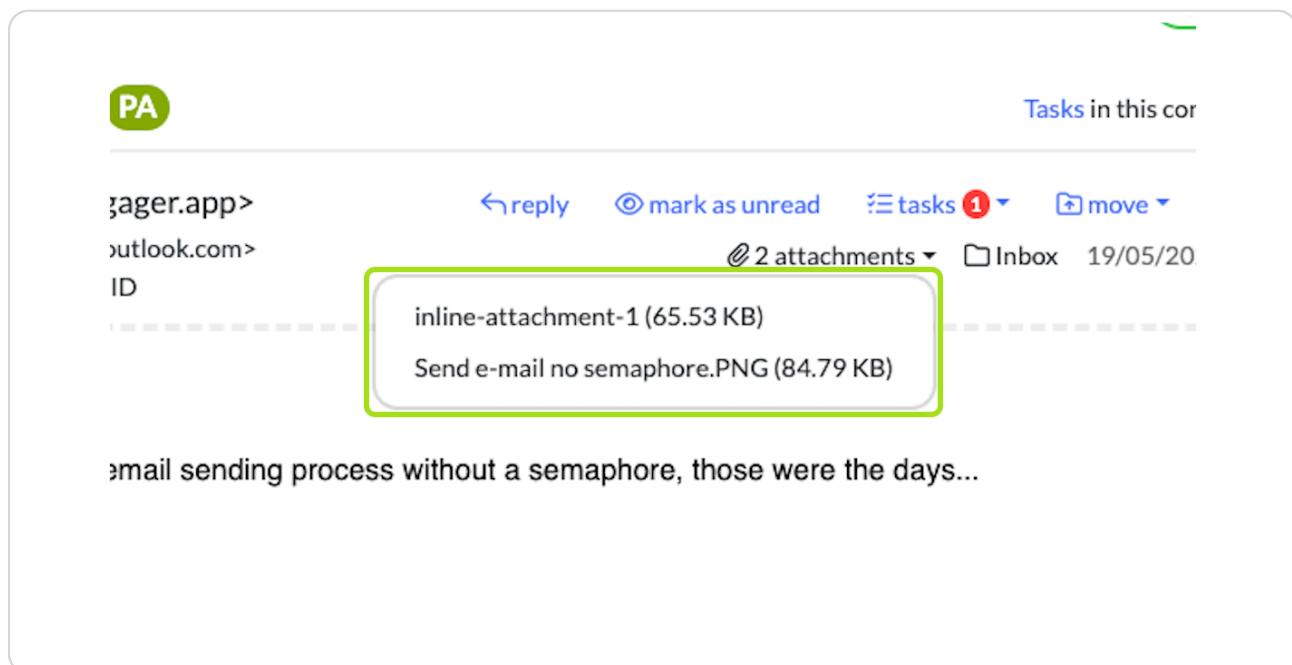
STEP 7

Click on attachments to see and download them



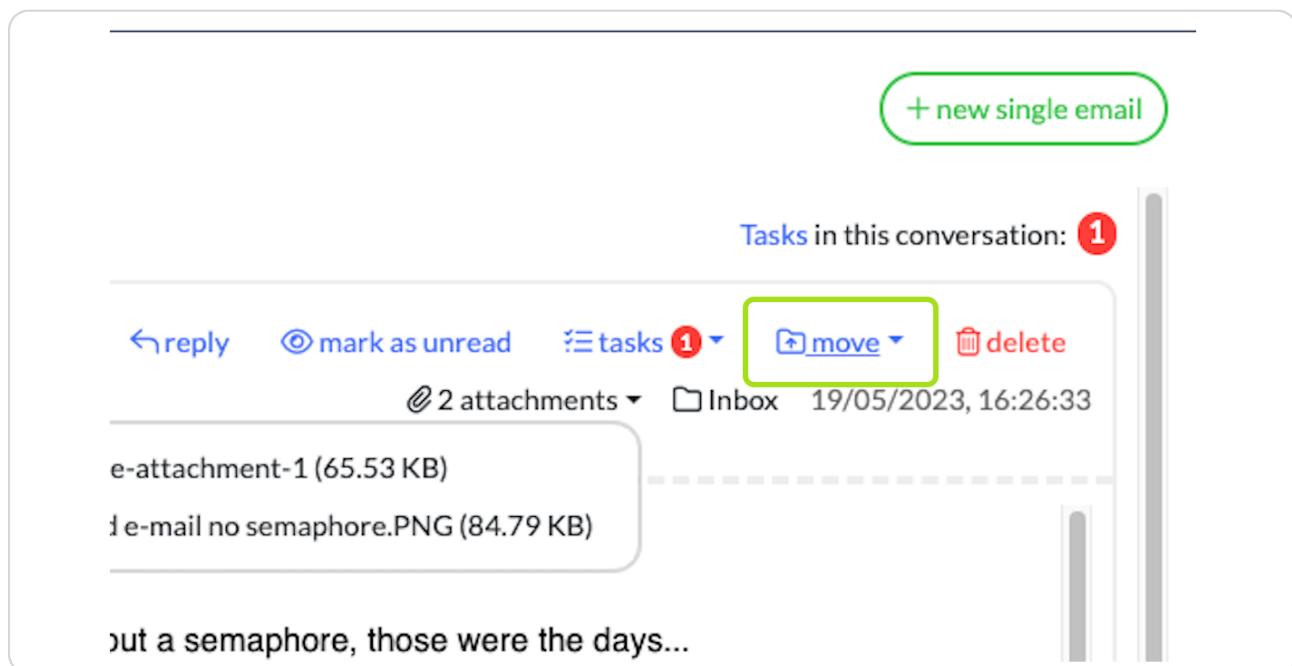
STEP 8

Click on inline-attachment-1 (65.53 KB)...



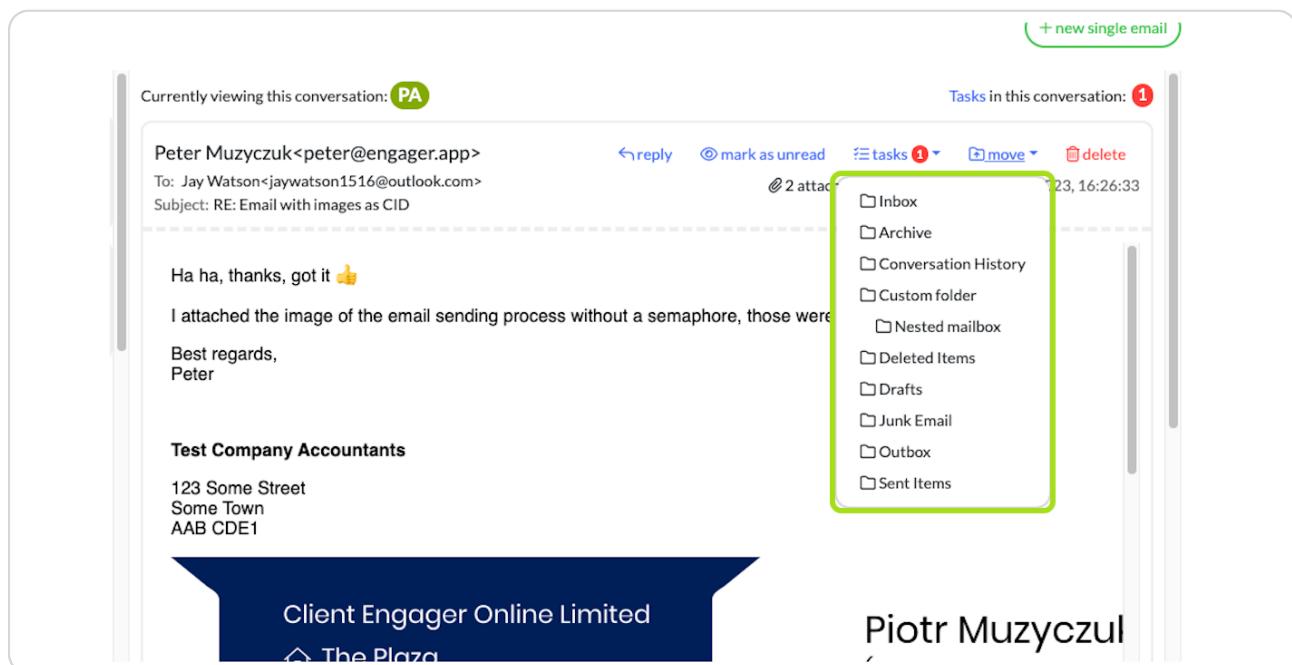
STEP 9

Click on move



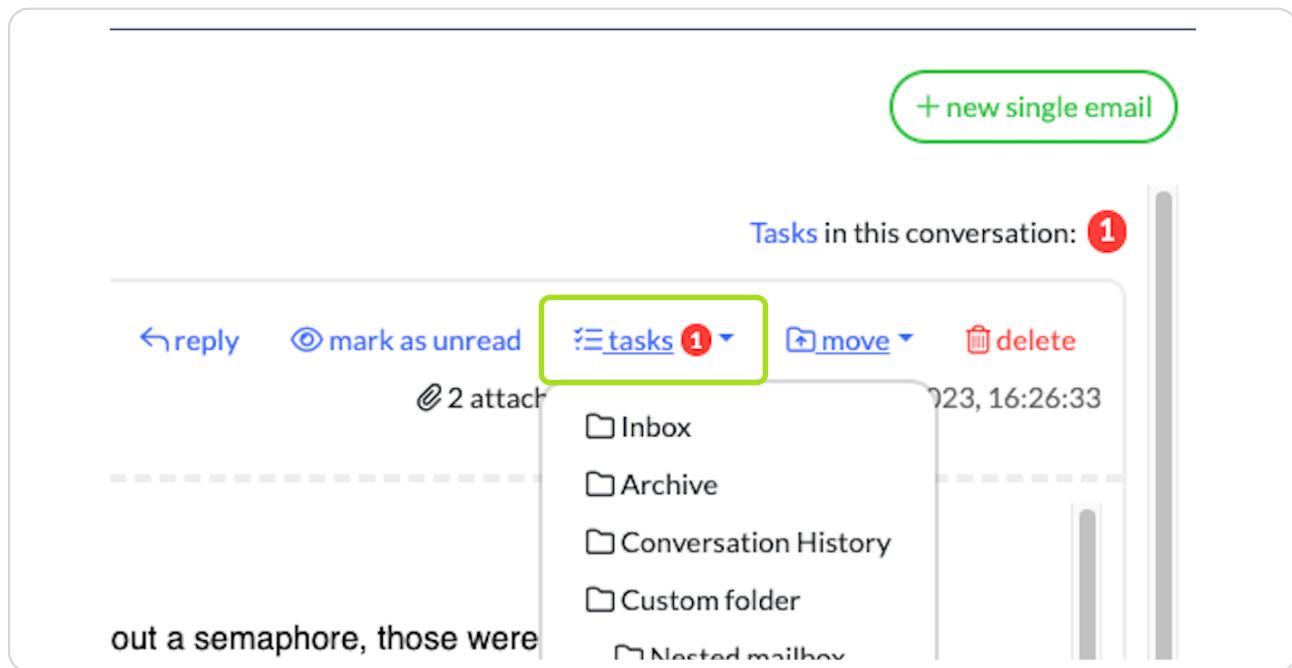
STEP 10

on this menu you can choose where to move the email



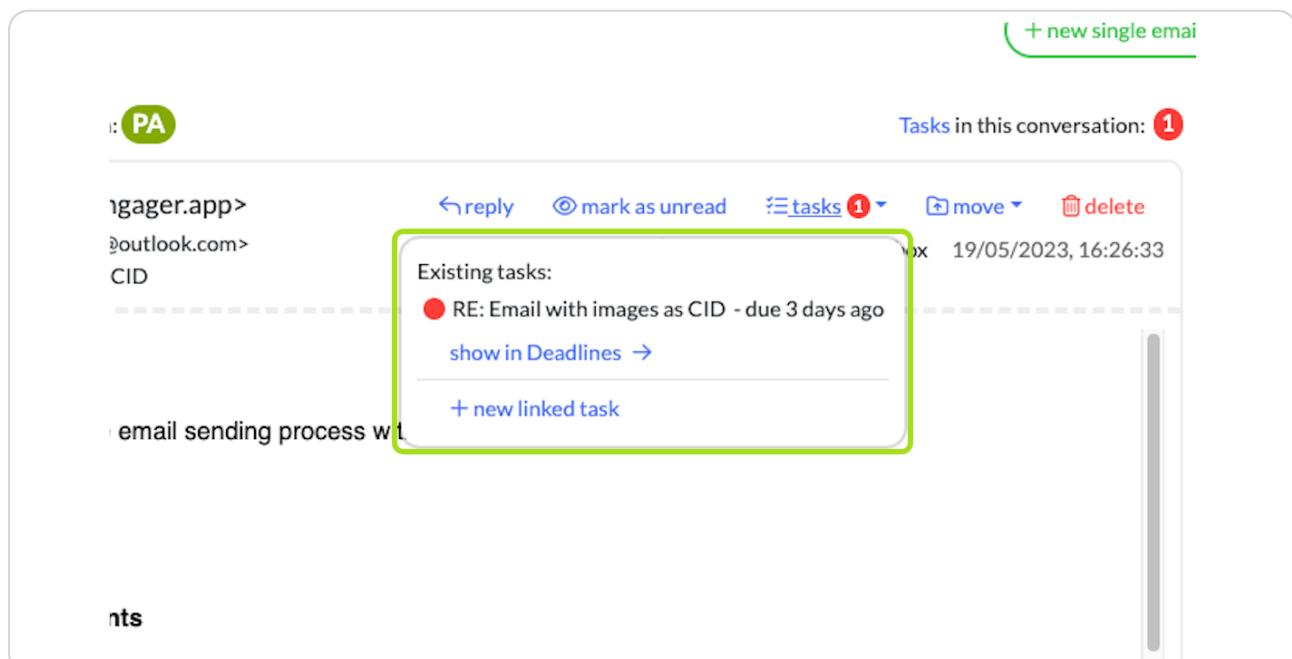
STEP 11

Click on tasks to see or create tasks



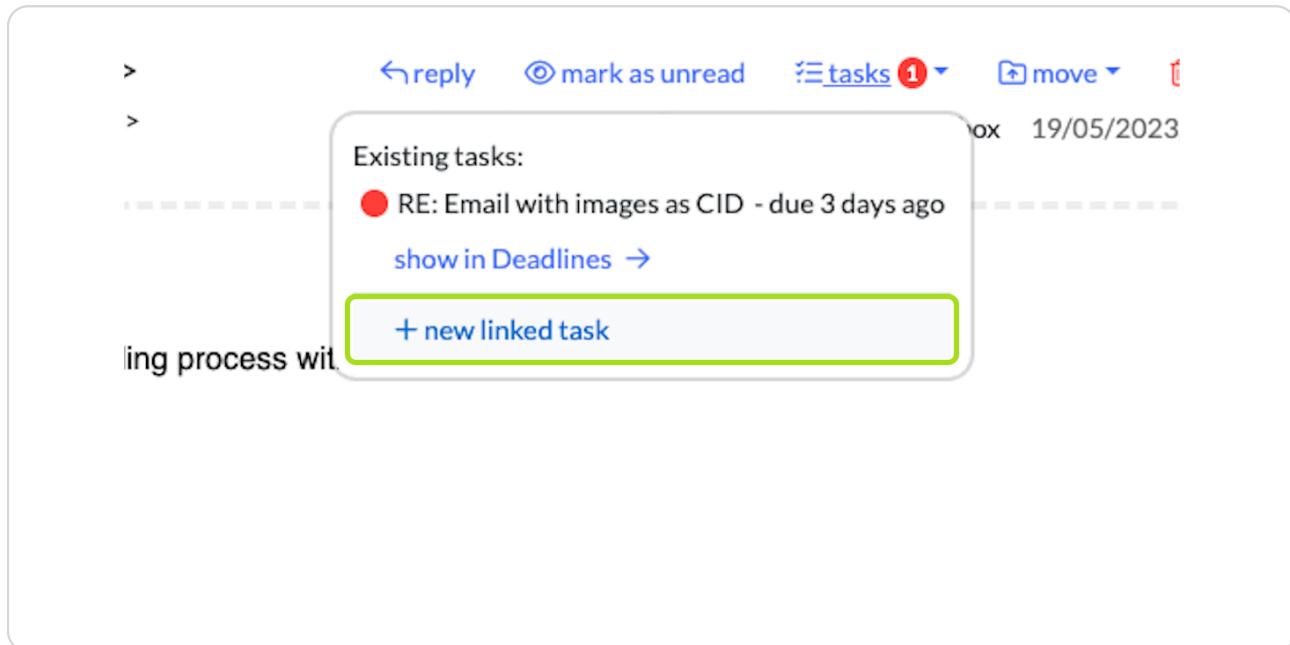
STEP 12

Click on Existing tasks:....



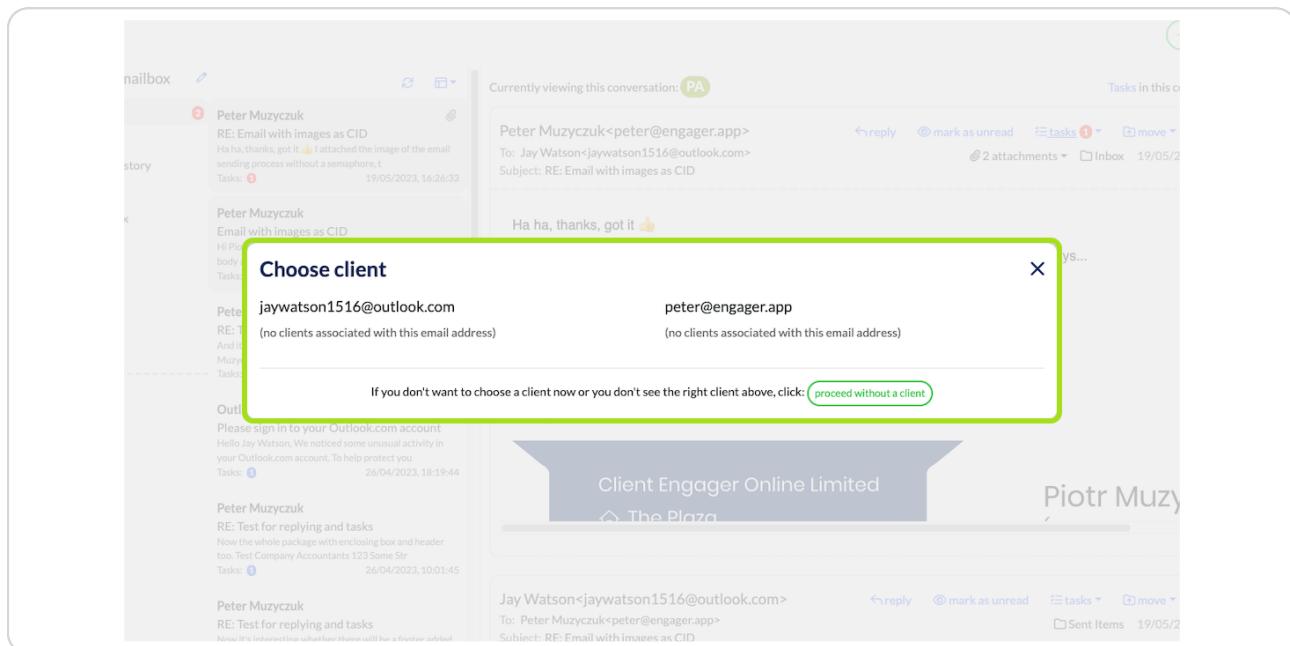
STEP 13

Click on new linked task to create



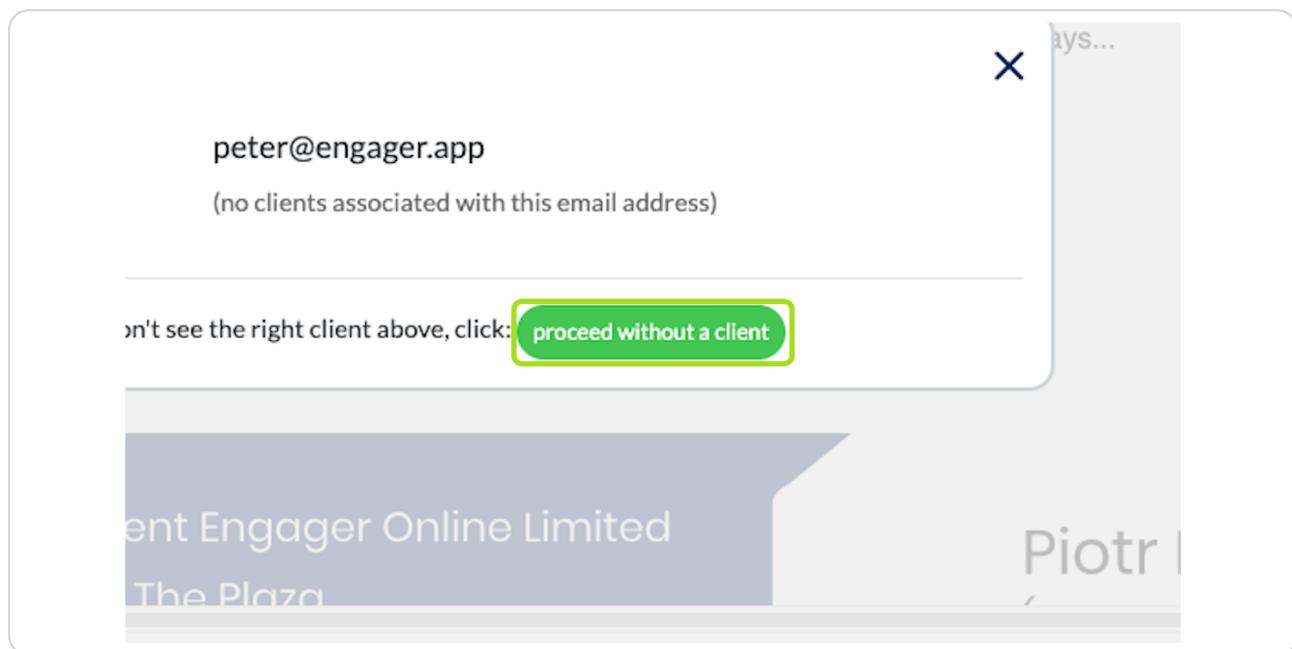
STEP 14

The system will check if the email is linked to a client and let you select the client if it is



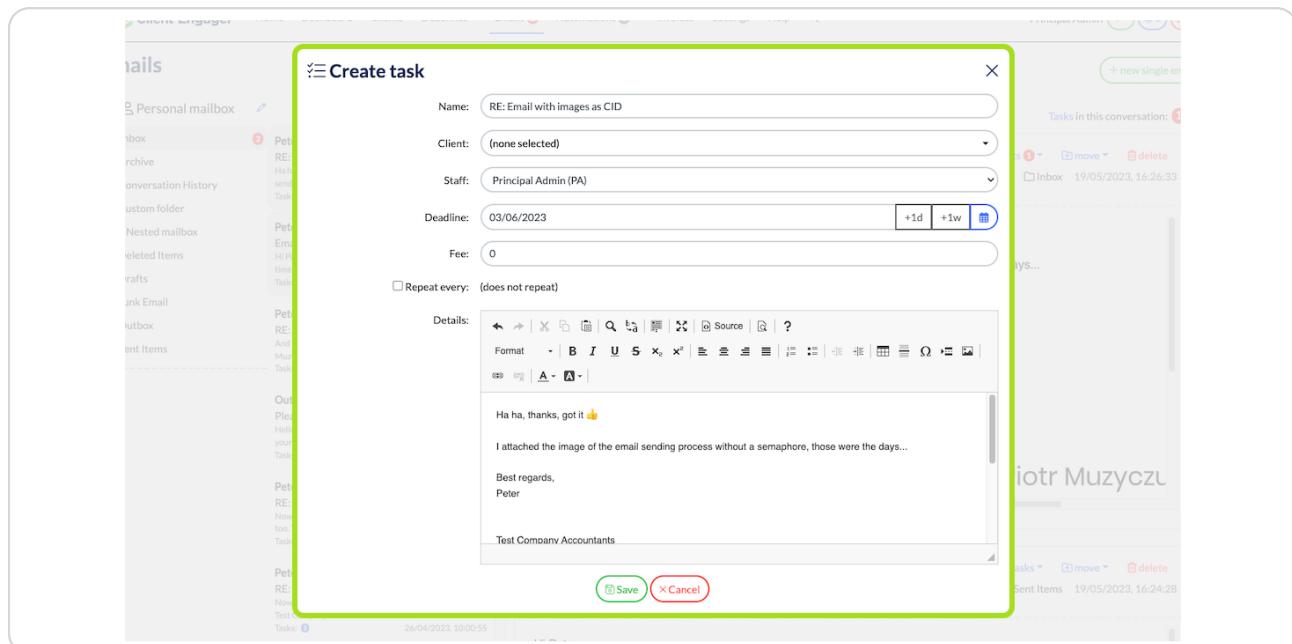
STEP 15

Click on proceed without a client if its not linked to a client



STEP 16

Create the task as normal and click save, the contents of the email will go in the notes section automatically



Tango

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