



# EMAIL MODULE INSTRUCTION MANUAL



OTYS Recruiting Technology





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# 1 | INTRODUCTION

## 1.1 ABOUT THE EMAIL MODULE

A large part of our communication today takes place via email. Communication with colleagues, but also with candidates and clients. As a recruiter you are like a spider in the web between these parties, and during the day a lot of emails end up in your inbox. To manage the flow of incoming and outgoing emails well, we developed the Email module. For these tasks you could of course also use an external email application such as Microsoft Outlook. The advantage of the OTYS Email module however, is that it is fully integrated with your database. Emails to and from candidates are not just individual emails, but are part of the complete dossier of communication between you and the candidate. This makes them easy to find, for instance during the assignment process, but also after several years when this candidate looks you up again for a new challenge. This also means time savings, because you can immediately access candidates and relations from the email with a click for editing purposes and can also create new candidates when you receive an email from a new applicant. In addition, you can easily link emails to relations or candidates. For example, you can link an email with feedback from a client to the candidate in a few clicks. In this way, you will always have an overview.

Please note: The Email module is not intended for sending newsletters. This can be done best using the Newsletters module.

## 1.2 PURPOSE OF THIS INSTRUCTION

In this instruction manual, we want to show the ease and operation of the various functions, so that you can leverage the Email module optimally for your daily activities and set it fully to your own wishes and needs.

## 1.3 INSTRUCTION STRUCTURE

This instruction manual begins with the introductory chapter explaining the added value of the Email module in Go! Next, the functionality of the module is discussed in detail.

The chapter 'Use Email module' is the core of this document. A number of basic tasks have been determined in order to use this module. These basic tasks come with clear instructions and are illustrated with screen shots. These include composing and sending an email, filters and searching for an email, dashboard widgets and overall email management.

The last chapter describes the options of the Email module for dealing with spam.

## 2 | OVERVIEW EMAIL MODULE

In this chapter we show the layout of the screens of the Email module, how you can customise this layout, and we explain the various icons you may encounter while using the Email module.

### 2.1 SCREEN LAYOUT OF THE EMAIL MODULE

The email window is divided into several sections:

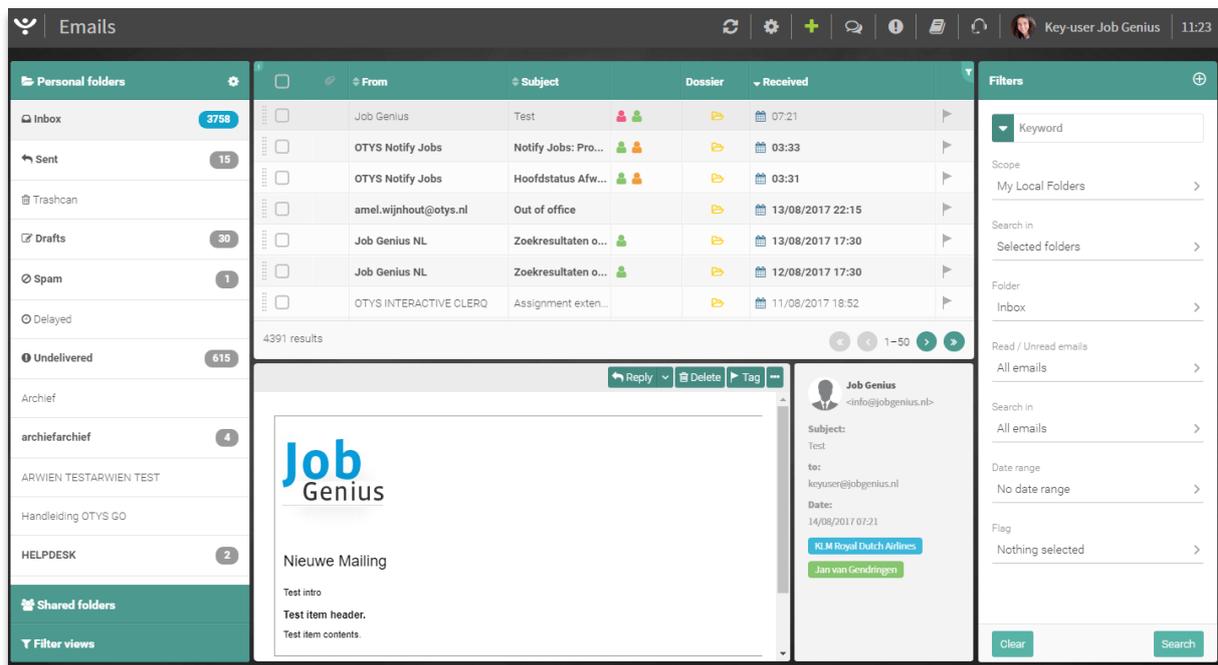


Fig. 1 - Screen layout Email module

- On the left you see a list with all your available folders. Some folders are pre-set for each user. These are 'Inbox', 'Sent items', 'Deleted items', 'Drafts', 'Spam', 'Delayed' and 'Undelivered'. It also features the folders you added.
- In the upper window you will see a list with the overview of the emails that are in the selected folder. At the bottom left is the total number of emails for the selected folder. If there are more emails in this folder than can be displayed in the overview, you can switch pages by clicking on the number in the bottom right corner of this window.
- In the top right corner you will see a blue Filter icon. By dragging it to the left, the Search filter will open and the other windows will shift slightly to the left.
- The window at the bottom of the page gives a preview of the selected email message in the list. Upon opening a folder, this message will be at the top of the list.

- To the right of the email you will find a small window with details of the received email, such as date received, sender and any other recipients. If these persons are in your database, you can click directly from the mail to retrieve their data.

You can alter the size of the sections in the email window. To do this, move your cursor over the edges between the sections. When your cursor changes, you can change the size. Drag the windows to the desired location. Repeat this process if you also want to change the size of other sections. The changes you made are automatically saved.

## 2.2 SENDER CATEGORISATION

You can see whether the sender of a message is already a contact in the system.

Known senders are represented by an icon highlighted in a colour. Unknown senders have no icons.



Fig. 2 - Sender categories

The green icons indicate business contacts known in the CRM. Colleagues are marked with red icons. In the case of email traffic to or from a candidate, an orange icon is displayed.

For candidates and business contacts whose email addresses are known, the mail is automatically stored in the corresponding dossier. Emails from senders who are not in the system are not stored in the dossier, unless you do it manually. Emails to colleagues are not saved in a dossier.

When a sender is in the system, but no figures are displayed in the column, an alternative email address was probably used. When the candidate of a message is not known, you can create a new candidate from the Email module. Just click on the 'New candidate' button in the menu of the bottom window.

### 2.2.1 PRIVATE EMAIL

Another type of tag is 'Private'. When you receive a message marked as private, you are the only one who can see this message. Even if the message is stored in the dossier, your colleagues cannot see it. How to mark a message as 'private' is described further in this manual. You can recognise a private email by the icon with an eye.

## 3 | SET THE EMAIL MODULE

Before we look at the daily use of the Email module, it is good to show some settings first. These take some time to set up but can save you a lot of time in the long term. One example is the setting of an automatic salutation or signature, so that you do not need to type it every time.

### 3.1 SET THE AUTOMATIC SALUTATION

Let's start with the automatic salutation. By setting a standard salutation for both formal and informal emails you never need to think about it anymore. The moment you are going to send a new email, the system automatically adds the salutation of your choice.

To set your automatic salutation, take the following steps:

1. Click the cogwheel symbol at the very top of your screen.
2. Click the tab 'Salutation' (GE85).
3. Select whether you want to edit the formal salutation or the informal salutation.
4. In the field 'Salutation', enter e.g. 'Dear'.
5. In the field 'Single/group' choose one of the available view options. For example, if you choose 'Dear Mr/Ms Surname' the system will automatically create a new email with the appropriate salutation, e.g. 'Dear Ms Brown', after completing the recipient. You can also select 'Personal' to enter a personal salutation.
6. Specify in the field 'Multiple' the salutation to be used for multiple recipients. For example, 'Dear all' or 'Dear Ms Brown, Mr Gingrich,'.
7. Click 'Save'

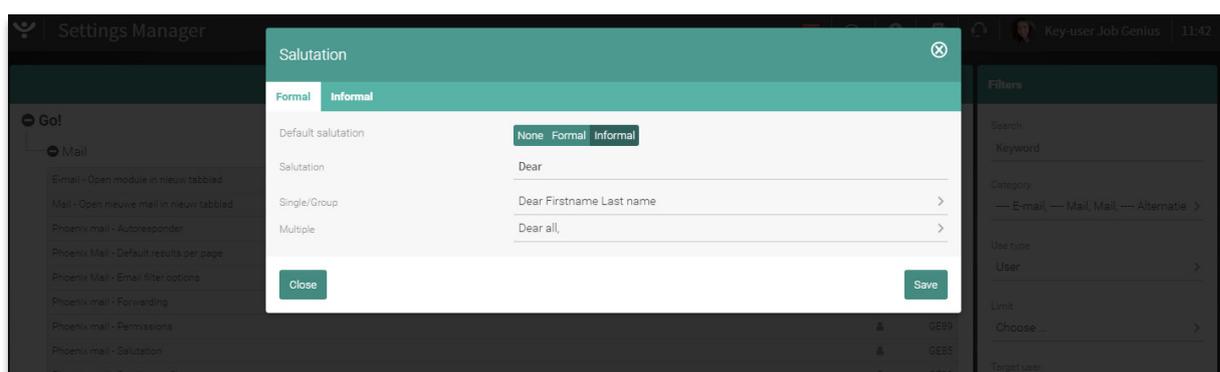


Fig. 3 - Set automatic salutation

### 3.2 SET THE AUTOMATIC SIGNATURE

To ensure that you do not need to type your name under all your emails, you can set an automatic signature. Follow these steps:

1. Click the cogwheel icon at the top of the overview. This will open a new window.
2. Go to the 'Signature' tab (GE84). Here are the settings for your signature.
3. Select the desired signature in the list 'Signature'.
4. A preview of your signature will appear at the bottom. If desired, edit the signature.
5. Click 'Save'

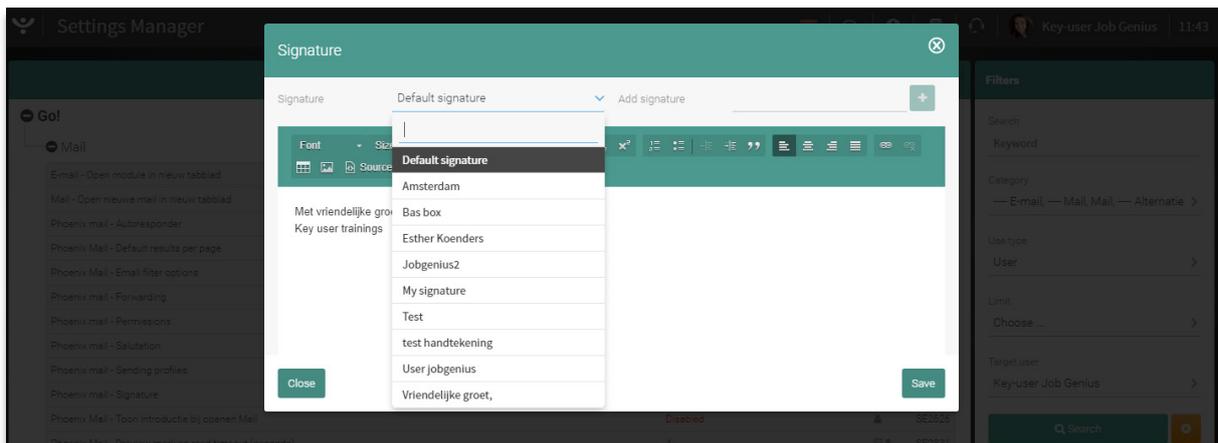


Fig. 4 - Set automatic signature

You can also save this signature after editing. If you do not want to change the existing standard signature, but want to create a new signature, you can enter a name in the field next to 'Create new signature', and then click on the '+' icon. Do not forget to click 'Save' in the top right corner when you're finished editing.

### 3.3 SET STANDARD MESSAGES

For example, for rejection of job applicants or confirmation of appointments. You can probably think of situations that occur frequently every day, and for which you use an email with more or less the same wording. You can easily use standard messages for this. This way, you do not have to type these messages again and again, or copy them from old sent emails, but you simply choose from a list when creating a new mail. Of course you can always edit these standard messages to suit the situation by changing names or dates, for example.

Follow these steps to create new standard messages:

1. Click in the right top corner of your screen on your name.
2. Then click 'Client settings'.
3. Enter the words mail templates' (GE30) in the search box on the right and press 'Enter'.
4. Click on the search result in the left panel.
5. If you have previously created standard emails you will see them in the list. Click on an item to open and edit it, if necessary.

6. Click on 'New entry' to create a new standard email.
7. In the next screen, you can enter a useful name and subject, indicate who may use this standard mail, possibly add an attachment and type a standard message in the text box.
8. Click 'Save' when you're done.

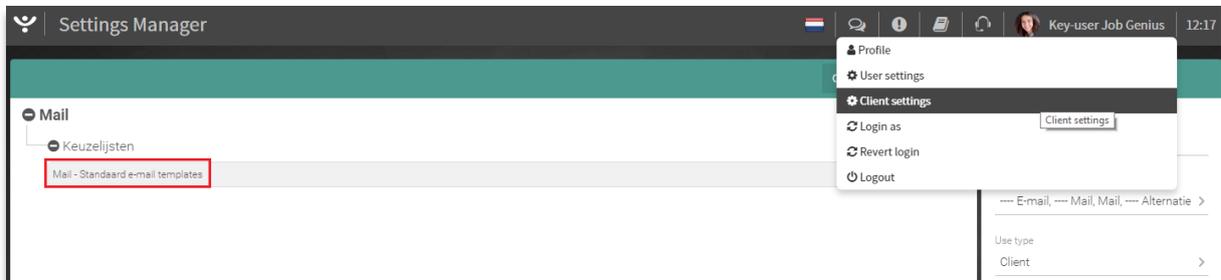


Fig. 5 - Create new standard messages

You can then start using this created standard message to compose emails.

1. Just click the green '+' symbol at the top of your screen.
2. To the right in your screen you will see 'Standard message'. Click to the right of it on 'Nothing selected' to open the drop-down menu.
3. Click in the drop-down menu on the desired standard message.
4. This will be loaded into the text box.

### 3.4 SET AN OUT-OF-OFFICE REPLY

Suppose you are not available for a few days or on holiday for a few weeks. You may want to send those reaching out to you an automatic email notification to let them know that you are temporarily out of office and when you will be back. Or to temporarily refer them to a colleague who will replace you during your absence.

To do this, you can set an automatic out-of-office message in the Email module. Follow these steps:

1. Click the cogwheel icon at the top of your screen.
2. Go to the tab 'Autoresponder' (GE38).
3. Manually disable or enable the out-of-office notification by ticking or unticking the box 'Active'.
4. You can also choose to activate the notification by ticking the above box and indicating an 'End date' at which the message is to be automatically disabled.
5. Please enter a subject.
6. Enter in the text box the message you want to leave in your absence.
7. Click 'Save'

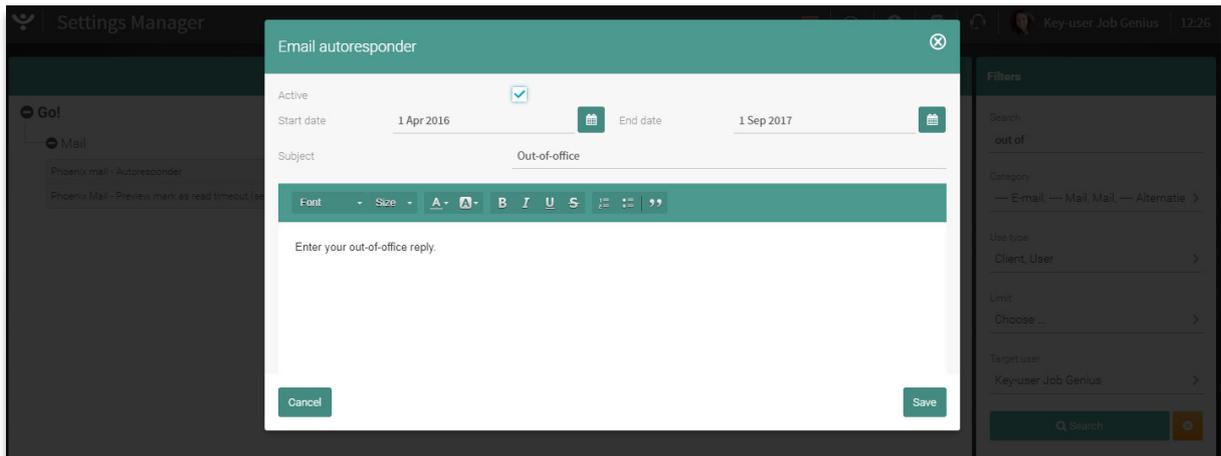


Fig. 6 - Set an out-of-office message

### 3.5 SET SEND PROFILES

It is possible to set multiple profiles for the sending of emails. This allows you to quickly modify your details, depending on the recipient of your email. Send profiles can be edited in the settings of the Email module in Go!

- Click the cogwheel icon at the top of your screen.
- Go to the tab 'Sending profiles' (GE90).
- Edit an existing profile or create a new one by clicking the '+' icon on the right.
- Edit the profile name, sender email address, and which template (website) and signature are to be used.

From now on, this created send profile can be selected by clicking the 'Settings' icon at the top while composing an email, after which a drop-down menu is displayed. Here, one of the created profiles can be selected.

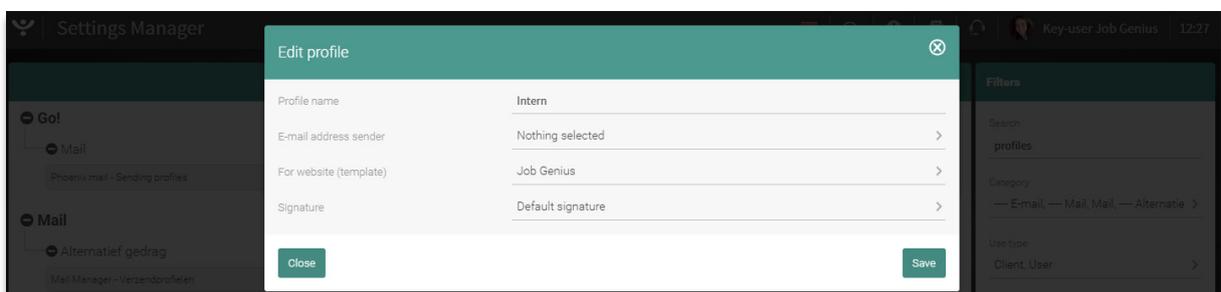


Fig. 7 - Set send profiles

## 4 | USE THE EMAIL MODULE

In this chapter we describe all the options when using the module. For example, the chapter elaborates on the drafting of an email and how different types of senders are displayed. The final sections of the chapter go into further detail on send groups, send profiles and advanced search via the search filter. Finally, the email widgets on the Go! dashboard are discussed.

### 4.1 COMPOSE AN EMAIL

This chapter discusses all the options for composing emails. For example, we focus on the act of creating a new email message. This means that this section also describes the manner in which recipients can be added, how the salutation and signature may be arranged, how attachments can be added and how documents can be linked to an email message.

#### 4.1.1 COMPOSE A NEW MESSAGE

At the top of your screen you will find the green '+' icon. Clicking on it will open a new window in which the email can be drafted.

When composing an email, three things are of particular importance. These are the recipient, subject and content of the email. These things are not only relevant for the correct sending of the email, but also for its correct storage in the dossier.

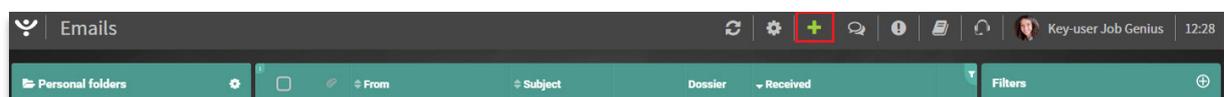


Fig. 8 - Compose a new email

#### 4.1.2 ADDRESS BOOK SUGGESTIONS

1. Click on the 'To' field.
2. Enter (part of) the name of the recipient in the field.
3. When the entered name or part of it is recognised by the system as a contact, it displays suggestions. You will need to enter at least three characters. Click the appropriate suggestion to accept it.
4. Repeat this process if you want to add more than one recipient.

Email addresses are clickable in most places in Go! This allows you to create a new email with that email address as the recipient.

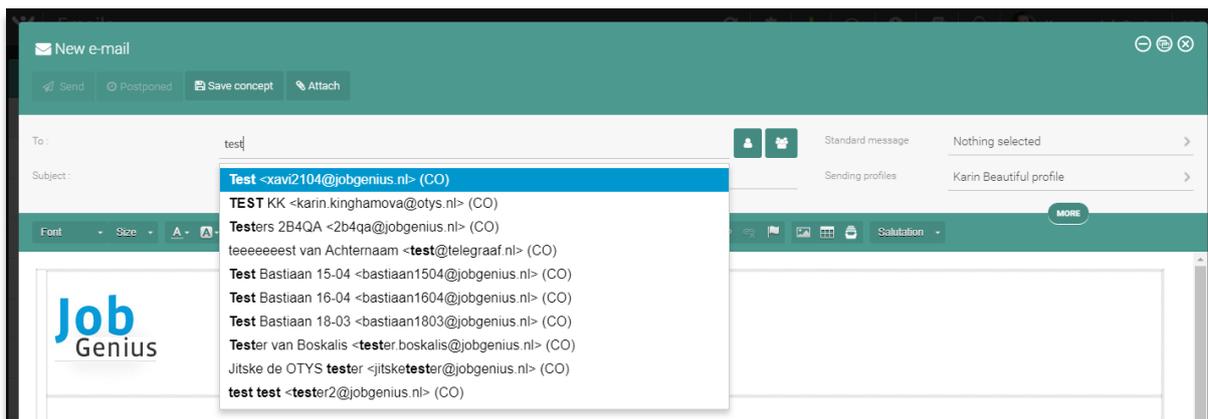


Fig. 9 - Select recipient

#### 4.1.3 CHOOSE AUTOMATIC SALUTATION

Please note: You can only use the automatic salutation when the full name of the recipient is recorded correctly in the system.

1. When creating a new email, click the 'Salutation' button in the bar immediately above the content of the email.
2. From the drop-down menu, select 'Formal', 'Informal' or 'No salutation'.
3. Verify that the generated salutation is correct.

If the salutation is not correct readjust it manually or click 'No salutation'. You can then manually add a salutation.

#### 4.1.4 INSERT A LINK

It is possible to add links to your email message. To do this, follow these steps:

1. If you want to add a link to a word or phrase, select it.
2. Go to the Edit field of your email
3. Then click the 'Insert/edit link' icon in the Edit menu
4. A new window will open.

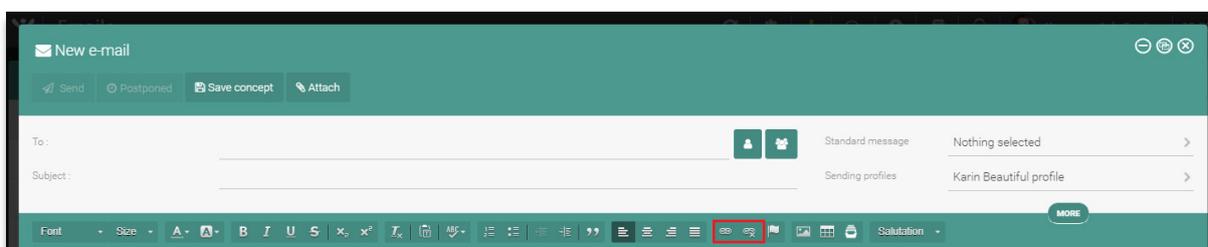


Fig. 10 - Insert a link

Use the tab 'Link description' to indicate the following types of links that you may want to select. Here, you have several choices.

- You can refer to an external website or protocol (see below) with an URL.
- By inserting an internal link to a page you can let readers of the email quickly navigate within the email.
- A reference to an email allows others to quickly create an email with the inserted link as the email address of the recipient.

If you want to insert an URL, you can select the protocol you need. Here you have the choice between:

- <http://> : Hypertext Transfer Protocol
- <https://> : http over a secure connection
- <ftp://> : File Transfer Protocol
- <news://> : News protocol
- <other>

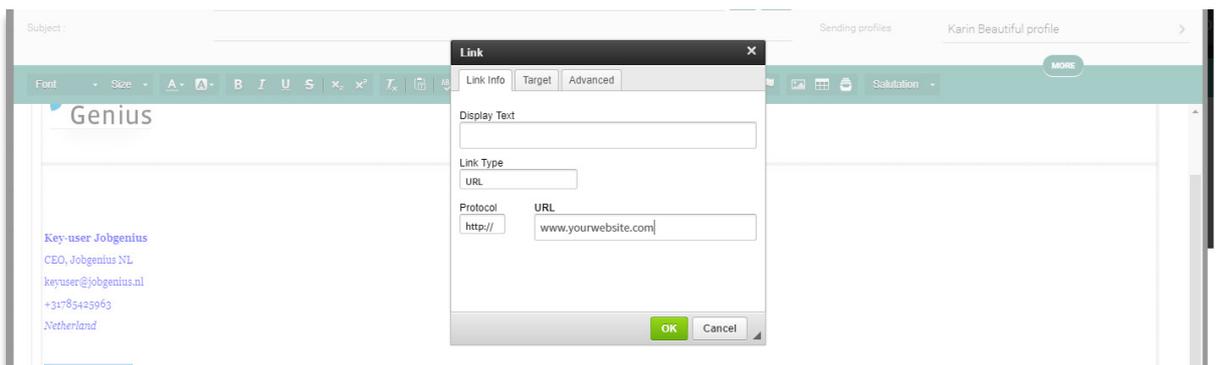


Fig. 11 - Insert URL

Do not forget to enter the URL. Additionally, this is the only type of link that will open the tab 'Target window'. On that tab, you can specify how the opening of such a link should be displayed. You can choose from the following target windows: <iframe>, <pop-up window>, New tab (\_blank), Full window (\_top), Same window (\_self) or Original window (\_parent). After making your choice, select 'OK' to insert the URL. If you do not select anything, an URL opens in a new tab by default.

If you want to send a file from an external source you can use the protocol: <ftp://> If you want to include a file in the email you do this via 'Attachment'. For this, see: 4.1.5. If you want to add an internal link in a page you will get an overview of the internal links present in the email message. You choose the appropriate link from the list and click OK.

If you choose email as link type, you have to enter the desired (target) email address and optionally also the subject and content. Then click OK to insert the link.

The tab 'Advanced' is a tab that is displayed for each link type. Here you can adjust (if desired) the following, which is then applied to the selected link type: Id, Writing direction, Access key, Tab sequence, Advisory title, Recommended content type, Stylesheet classes, Character set of linked source, Relation, Style. Remember to click on 'OK' after editing.

#### 4.1.5 ADD AN ATTACHMENT

- When composing a new email, click on the 'Attachment' button at the top of your screen.
- Click '+ Add attachment'. The file folder will be displayed.
- Select the relevant file.
- Click 'Open'.

The added file will be displayed on the right of the screen. In the file list, next to the name, the file type and size are also displayed. If you want to delete the file, click the trash can icon.

Please note: The name of the file you insert must not be longer than 64 characters, including the extension (such as .doc).



Fig. 12 - Add an attachment

#### 4.1.6 ADD IMAGE

Images can be added in two ways: as a file in the attachment, and by inserting a link referring to the image. We have just discussed how to add an attachment in the previous chapter.

It is also possible to insert an image using an URL when composing the mail. At that time, the file is not attached but will be displayed as a physical image in the email. To add an image in this way, click on the 'Image' icon in the edit bar.

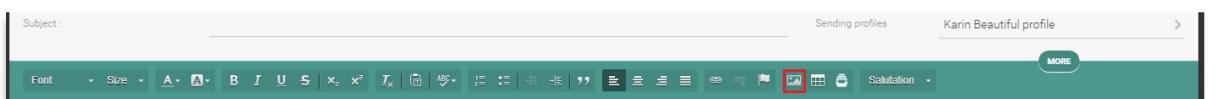


Fig. 13 - Add Image

A new screen will be displayed. The standard tab that will open is 'General'. In this tab, you can enter an URL that refers to the image as well as see a preview if the correct URL is entered. It is possible to display an alternative text and change the following options under the tab 'Advanced':

- Width and height. This is visible immediately after an adjustment.
- The width of the edge.
- The horizontal and vertical space to be kept clear.
- The alignment (not filled, left or right).

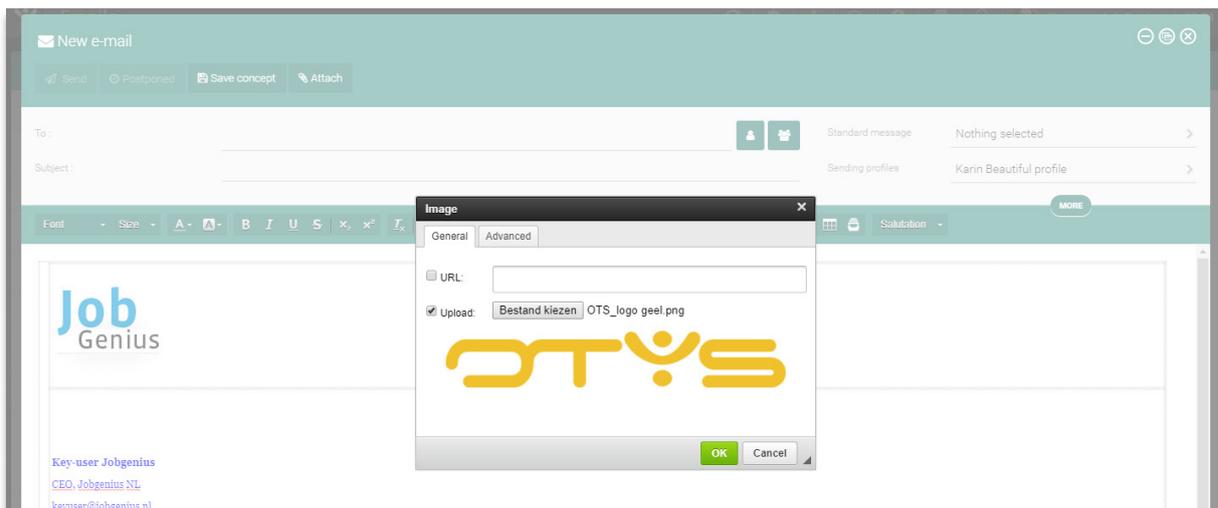


Fig. 14 - Add image external menu

#### 4.1.7 INSERT MATCHED DOCUMENTS

One of the advantages of linking the Email module to the other modules in OTYS is that documents can be found in the dossiers of the matched candidates and relations. For example, it may be useful to compose an email with the CV of a candidate, directly from that candidate's dossier.

To attach matched files, follow these steps:

1. Create a new email and click the 'Attachment' button.
2. Select 'Link files' from the drop-down menu.
3. Now a pop-up screen is displayed where a file from other dossiers can be inserted.
4. In the right drop-down menu, choose whether you want to search files associated with, for example, a candidate, colleague or relation.
5. Use the search field to find the desired candidate, colleague or relation.
6. Select the desired search result.
7. Click on 'Link'.

In the window displayed, you can search for users, candidates, relations, contacts, calendar item, vacancy, task and document. You have the option to insert documents of several of the contacts referred to above. You can then attach them to this email.

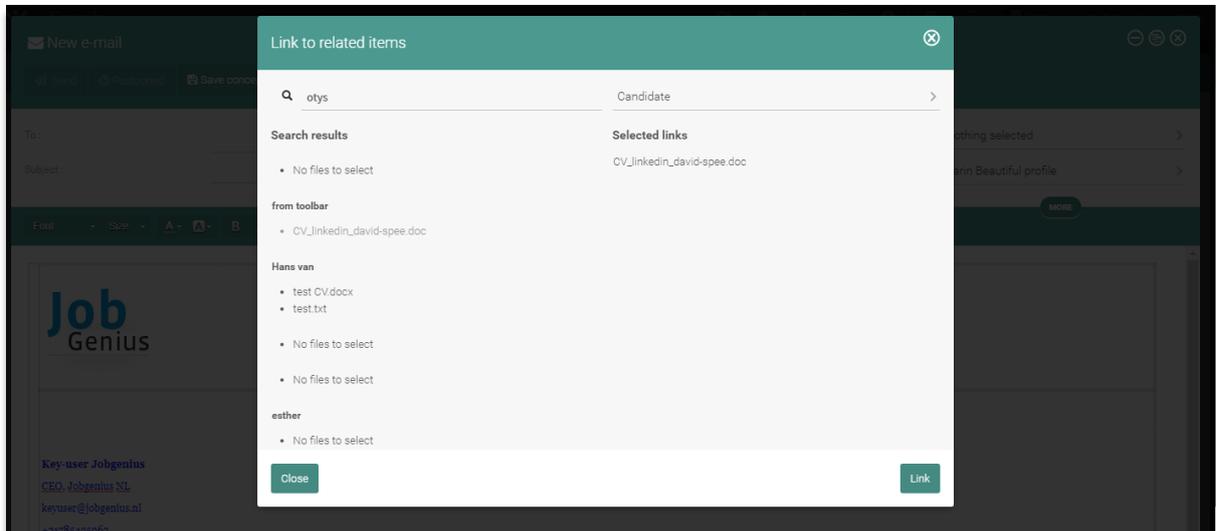


Fig. 15 - Add matched files

## 4.2 EMAIL SEND OPTIONS

This section focuses on the send options in the Email module. It describes the immediate way to send an email and also how to send a delayed email. Finally, the chapter also shows how you can select groups and how to set send profiles.

### 4.2.1 SEND EMAIL IMMEDIATELY

When you have created an email according to the previously discussed options, you probably want to send the email.

After composing the email and entering the recipient, you can click on the button 'Send' at the top of the screen and the email will be sent.

### 4.2.2 SEND DELAYED EMAIL

You can also choose to send the email at a specific date and/or time. After composing the email and entering the recipient, you can click on the 'Delayed' button at the top of the screen.

Clicking on this icon opens a pop-up window. Specify the date and time the email must be sent.

Please do this with care. The email is immediately placed in the 'Send delayed' folder after you click 'Send'.

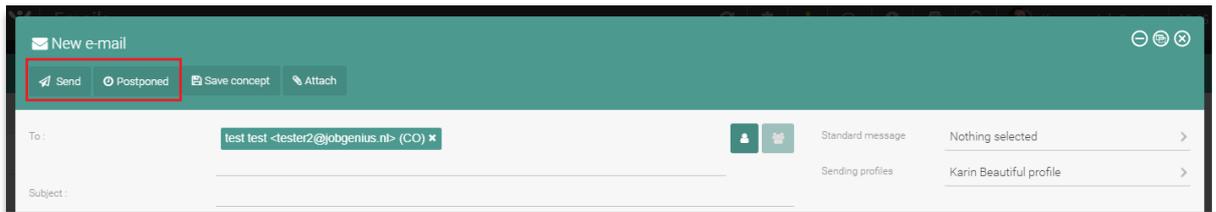


Fig. 16 - send email immediately or delayed

#### 4.2.3 SAVE EMAIL AS DRAFT

Click the 'Save as draft' button to temporarily store your email. You can later continue working on this email. You can find the email in the 'Drafts' folder at the left of your screen.

When you click the cross while editing/composing an email, you will always be asked if you want to keep the composed email as a draft. You can then find it in the Drafts folder.

#### 4.2.4 GROUP SELECTION FOR SENDING

You may want to send an email to a specific group of users. Of course you can always manually add users, as previously discussed. However, if you regularly send emails to a group or category of recipients, it is more convenient to assign these recipients to a group. This is possible in the Email module. For example, you can add a group per organisational unit so you can send an email to those in that unit with one action. Follow these steps:

- Create a new email.
- Click on the green 'Add groups to recipients' button in the top right corner of the bar 'On'.
- A pop-up window will appear. Select the group of recipients from the list. Subsequently, these are displayed on the right.
- You can select multiple groups.
- Then click 'Add' to add the groups as recipients of your email.

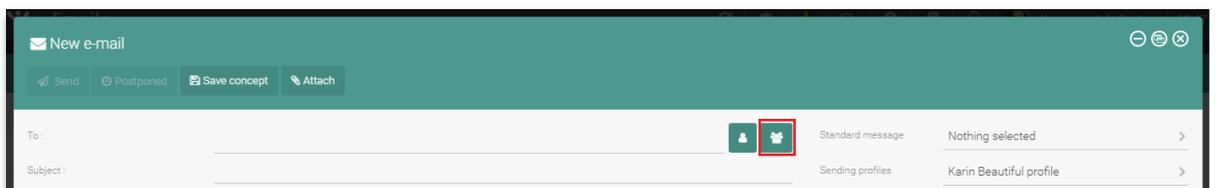


Fig. 17 - Send email to group

If you want to remove a selection, click it so it moves back to the selection list. If you have made the correct selection, click 'Add' and then the selection will be added to the various recipients. You can edit the group list, and add new groups using the 'Newsletters' module.

#### 4.2.5 SEND PRIVATE EMAIL

All emails from senders who are in the system are stored in the dossier. In some cases it may be desirable that not everyone can see a particular message. You can set messages to private so you are the only one who can see them and they will not be kept in the general dossier.

Sending a new email as private is easy:

- When composing a new email, click the 'More' button under the subject line.
- The send menu will be expanded and gives multiple options.
- Tick the box 'Private'.
- Click Send. The private email has now been sent.

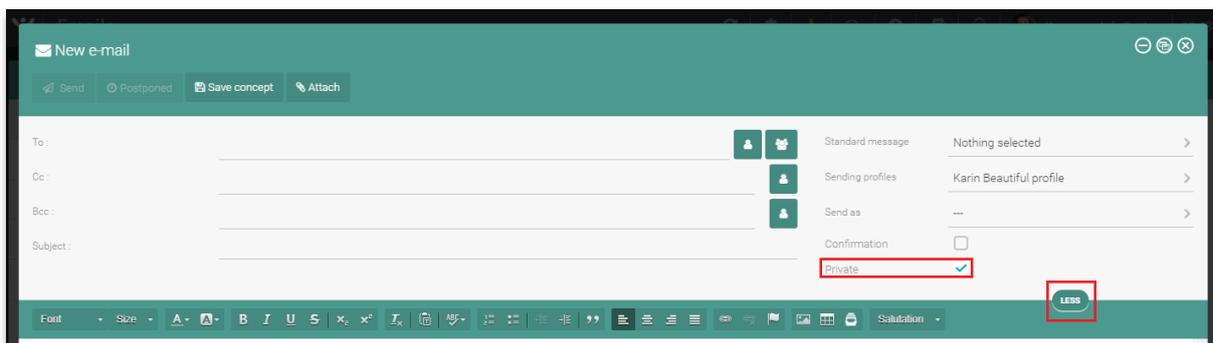


Fig. 18 - Send private email

### 4.3 SEARCH FOR EMAIL

#### 4.3.1 SEARCH FILTER

With the search filter, you can search by keyword and you can specify whether you want to search with specific search criteria (this folder, all folders, specific folder(s), read/unread, flag). The Email module always displays the last used setting when opening the Filter module.

A standard search is viewed as an 'OR' search. This means that if you search for 'OTYS Academy', you are searching for all emails containing the word 'OTYS and/or the word 'Academy'. The reason behind this is that, with an OR search, you can search, for example, with 'cust' in all emails containing the word 'customisation'.

If you want to search using an 'AND' search, i.e. a search with the combination of two or more terms, you can do this by entering 'AND' between the terms you are searching for. So you can search, for example, 'OTYS' AND 'Academy' to search all emails containing the combination of the two terms.

The search filter in the Email module can also be extended to search for specific keywords.

- Open the search filter by clicking on the blue Filter icon in the upper right corner.
- Drag the icon to the left to get the filter to appear.
- Click on the blue icon next to 'Keyword' to display these advanced options.
- Enter the desired variables for which you want to perform an advanced search:

- 'From',
- 'To',
- 'Subject'
- 'Contains the words'
- 'Does not contain'.

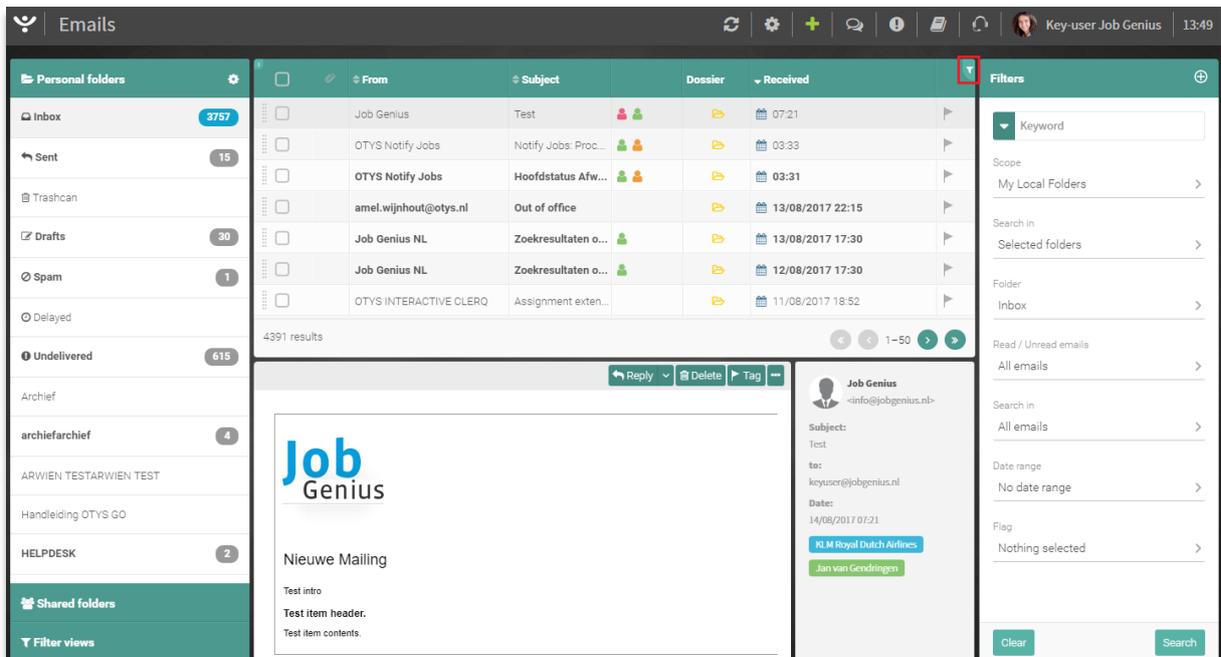


Fig. 19 - Open Search filter

Then click 'Search' to search the selected folders based on your search criteria. To remove the search filter, click on the 'x' icon at the bottom.

#### 4.3.2 SAVE FILTER VIEW

If you want to save certain filters for future searches, you can add a filter view:

- Open the search filter by clicking on the blue Filter icon in the upper right corner.
- Drag the icon to the left to get the filter to appear.
- Click on the blue icon next to 'Keyword' to display these advanced options.
- Enter any desired variables for which you want to perform an advanced search;
- Click the '+' icon in the top right corner of the filter to save a new filter view.
- Enter the name of the new filter view;
- Click '+ Add'



Fig. 20 - Create Filter

The search filter has now been saved. You can retrieve it in the left column from the folder 'Filter views' (under your personal folders). You can now see this filter view in the email widget on the Go! dashboard, if you have activated it. More on this can be found in section 4.4.

If you then want to edit or delete the search filter, click it in the left column. When you do this, you will see the set values in the right column as well as some new menu options (add, save and delete). If you want to edit the search filter, you can adjust the values and click on the Save icon. If you want to remove the search filter than click the Delete icon.

#### 4.4 EMAIL WIDGETS DASHBOARD

The dashboard was also introduced in OTYS Go! The dashboard allows you to quickly show the most relevant information through widgets when logging into Go! You can easily add widgets via the 'Configuration' button in the top bar of the Go! overview. When you are in Configuration mode, you will see a Settings button on the widget of your dashboard. You can change the settings of a specific widget via this widget configuration button.

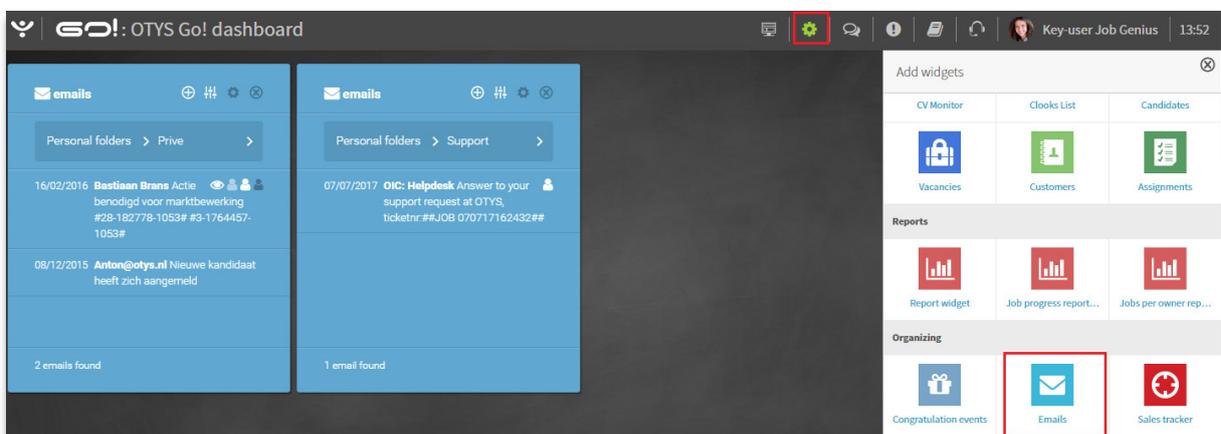


Fig. 21 - Add and set Email widget

You can place multiple email widgets on your dashboard by dragging them. By then clicking on the configuration button of the widget itself, you can set which email folder you want to display.

If you click on a widget title you will go directly to the appropriate folder. If you click on a specific email you will go directly to this email. You can also select a search filter in this widget, provided you have set this in the Email module. See 4.3.2.

## 4.5 MANAGE EMAIL AND FOLDERS

This section focuses on the management of received emails and emails to be received (future emails). It explains how to delete, move and mark emails. It also explains how you can edit folders.

### 4.5.1 REPLY TO OR FORWARD EMAIL

When you receive an email, you can answer it simply by selecting it. Then click in the preview window on 'Reply'. You will then see a new window with the sender of the email as recipient. Next, write the email and send it as described above.

If you want to send an email reply to all recipients, click in the preview window on the arrow next to the 'Reply' button, and then select 'Reply All' in the drop-down menu.

If you want to forward a received email, you can also do so by clicking on the arrow next to the 'Reply' button, and then select 'Forward' from the drop-down menu. You will then see a new window containing the contents of the received email. Then, add the person(s) to whom you wish to send the email and send it.

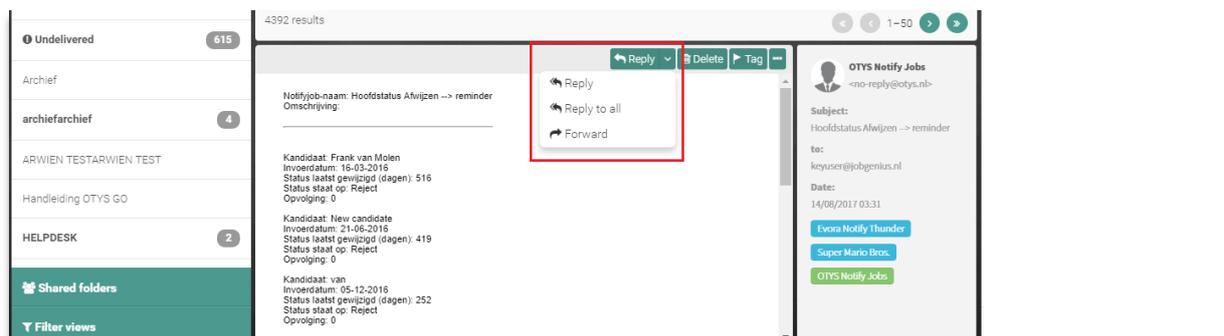


Fig. 22 - Forward an email or reply to all

### 4.5.2 DELETE AN EMAIL MESSAGE

To remove a specific email, click it in the list. The preview appears in the window below. At the top of the preview you have some options to choose from, including 'Delete'. Clicking on it will move the email to the trash can.

It is also possible to delete multiple received and future emails from a specific sender. You can use the appropriate batch action to this end. See 4.5.6 Batch actions.

### 4.5.3 CREATE AND EDIT FOLDERS

Your own folders are listed in the left column under 'Personal folders'. In addition to the default folders Inbox, Sent, Trash, Drafts, Spam, Delayed and Not delivered, you can also add others.

- Go to the overview of the Email module.
- Click on the left on the Settings icon next to 'Personal folders'.

Edit folders by clicking on the Edit icon. Delete existing folders by clicking on the red 'Trash can' icon. Add a new folder by clicking on the '+' icon. Remember to click on 'Finished' at the bottom to save the changes after this operation.

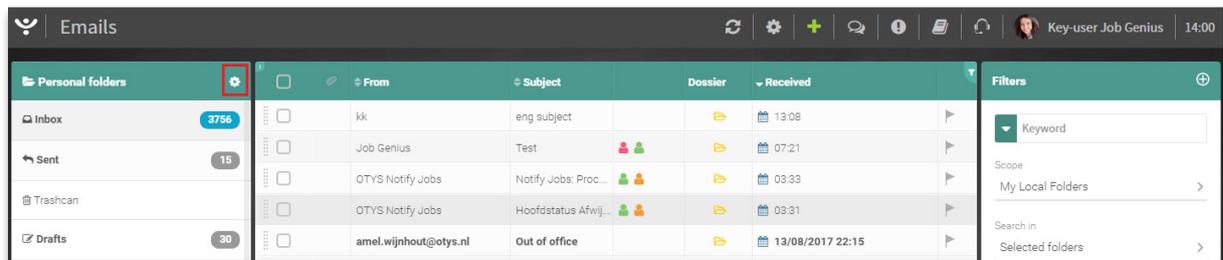


Fig. 23 - Add or edit Personal folder

#### 4.5.4 MOVE EMAIL(S) TO FOLDER

Emails can be moved in two ways.

First, there is the option to place emails directly into the desired folder. Do this by simply dragging the desired mail from the overview to the desired (personal) folder in the left column. You do this by hovering your cursor over the beginning of the line of the email. You will see your cursor change into an open hand. You can start dragging when you see the hand. This can also be done for more emails simultaneously by ticking the emails and then drag one of the selected emails to the desired folder. Next, all selected emails will be moved to this folder.

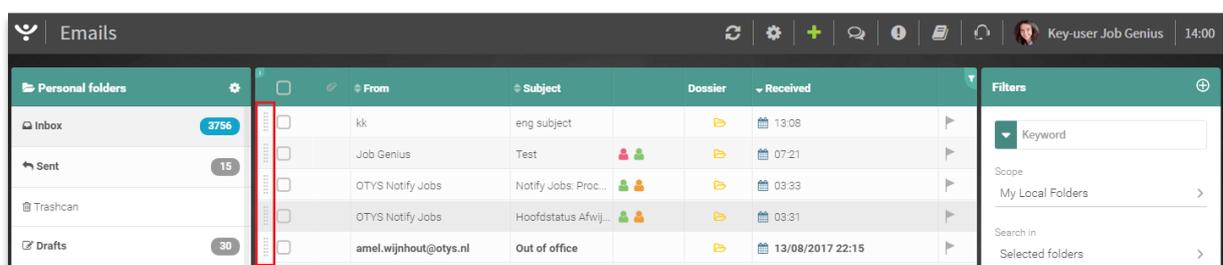


Fig. 24 - Drag emails to another folder

Additionally, you have the option to move all already received (and future) emails from a particular sender to a desired folder. You can do this with a batch action. We refer you to the 4.5.6.

#### 4.5.5 MARK EMAIL

Sometimes it can be useful to mark an email as unread after reading. For example, for someone else or for yourself, for at a later time. You do this by right-clicking the appropriate email in the overview. Then select 'Mark as read' or 'Mark as unread' in this quick menu.

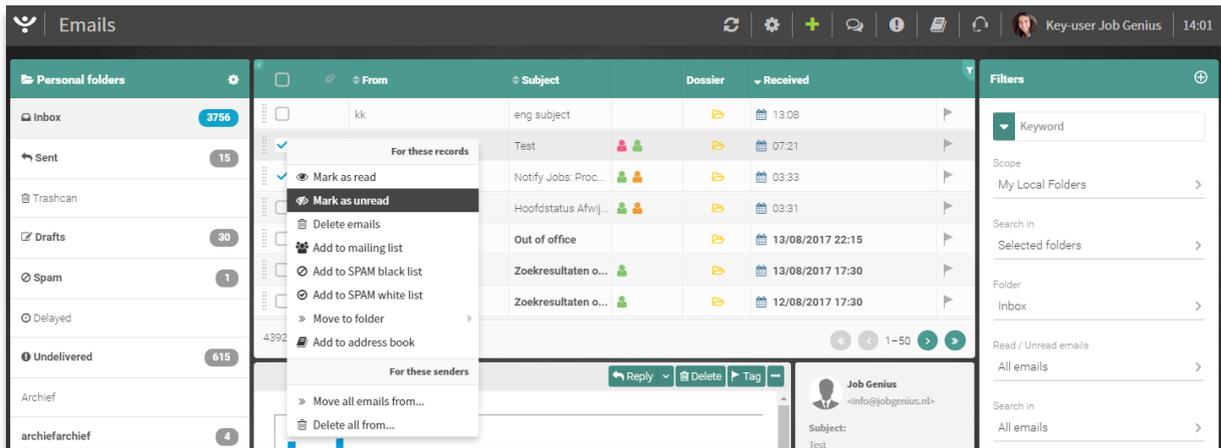


Fig. 25 - Mark emails as read/unread

You can mark emails with coloured flags to conveniently classify them according to priority. You can do this in two ways:

1. The first way is via the overview. After you select a folder (for example: 'Inbox'), you are shown all the emails in this folder in the overview. In one of the columns (depending on how you have laid out your columns) you will see grey flag icons. By clicking on it you will see a menu where you can select the priority with the corresponding coloured flag. The mail is now marked.
2. The second way to mark an email is by using the preview window of the selected email that you wish to highlight. When you click in the menu bar of the preview window on 'Tag' you will see the menu where you can make a selection.

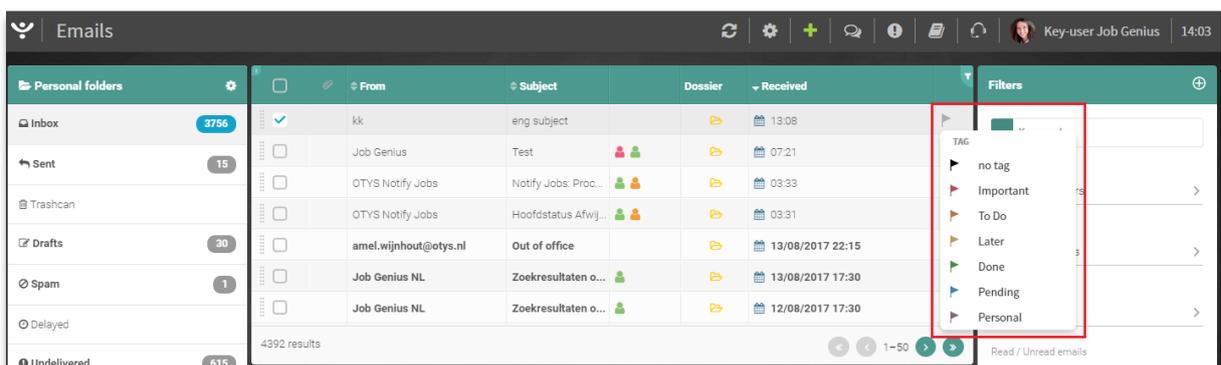


Fig. 26 - Mark emails with coloured flags

You can also mark received emails as private. The same rules apply as with 'Send private email' in section 2.2.1. To do this, select the relevant email. When you click on 'More' in the menu bar of the preview window, and then on 'Mark as private', the email will only be visible to you.

#### 4.5.6 BATCH ACTIONS

With batch actions, it is possible to save time by performing some of the most common actions on multiple emails simultaneously. This is done as follows:

1. Tick the boxes of the relevant emails in the email overview.
2. Right-click the mouse button. The batch action menu will open.

The standard actions are 'Mark as read/unread', 'Add email to address book', 'mailing list', 'blacklist/whitelist'. Moving or deleting email(s) for specific senders is also possible.

#### 4.5.7 OTHER OPTIONS

The Email module offers some more new options to make the managing of incoming emails even easier. These include, for example, the direct addition of contacts or candidates to the system from the email. Also, you can link incoming email to other users, candidates, relations, contacts, vacancies, calendar items, tasks or documents to make them visible in the dossier.

#### 4.5.8 ADD CONTACT DETAILS TO ADDRESS BOOK

The contact details of the sender can be easily added from the email overview to the address book. You do this by simply right-clicking the relevant email in the overview, and then click 'Add to address book'. Reconfirm in the pop-up menu and the contact will be added.

#### 4.5.9 ADD SENDER AS A NEW CANDIDATE

Another option is to add a candidate to the system from the incoming email. This can be useful if you receive an unsolicited application by email. You can do this by selecting the email and then clicking in the menu of the preview window on 'More' and then on 'Create candidate'. Check the data and complete where necessary in the pop-up menu that will appear. When you click 'Add candidate' the contact will be added as a candidate.

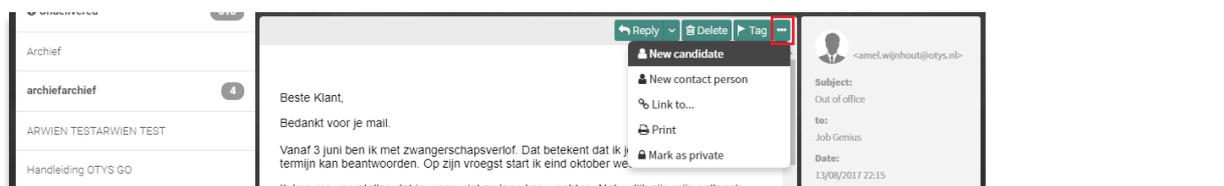


Fig. 27 - Add sender as a new candidate

#### 4.5.10 ADD EMAILS TO DOSSIER MANUALLY

You can link emails to contacts and candidates when you want them to be visible in the dossier. You do this by selecting the email and clicking 'More' in the menu of the preview window. Then choose 'Link to' in the drop-down menu. You then search for users, candidates, relations, contacts, vacancies, calendar items, tasks or documents to link and make visible in the dossier.

## 4.6 SPAM

The Email module has a built-in spam filter. Spam email is automatically recognised and moved to the spam folder. Sometimes emails from approved senders also end up in this folder if they share certain spam characteristics. To optimise the spam filter, the Email module has two lists for addresses and domains.

You can add senders of junk email to the Blacklist. All emails from addresses and domains in this list end up in the spam folder.

Approved senders of emails can be added to the Whitelist. Emails from domains and addresses in this list never end up in the spam folder.

Please note: The emails in the spam folder are automatically deleted on a regular basis. It is therefore important to check the spam folder for emails that are incorrectly identified as spam on a weekly basis. Because email is automatically deleted from the spam folder, you do not need to remove it yourself. When you do remove it, the spam ends up in the folder 'Deleted items', where it is stored for three months and unnecessarily takes up disk space.

### 4.6.1 WHITELIST

Sometimes it is desirable to prevent emails from a particular sender being moved to the spam folder. For this you should take the following steps:

1. In the email overview, right-click the email.
2. Click 'Add to SPAM whitelist'.

### 4.6.2 BLACKLIST

Sometimes it is desirable to move emails from a particular sender to the spam folder. For this you should take the following steps:

1. In the email overview, right-click the email.
2. Click on 'Add to SPAM blacklist'.

### 4.6.3 MOVE IN BATCH

If all emails from a sender must immediately be moved to the 'spam' folder or any other folder, follow these steps:

1. In the email overview, right-click the email.
2. Click 'Move all emails from ...'
1. Select whether it concerns all emails received or all received and all future messages from the sender;
2. Click on the drop-down menu and select the folder where all the emails should be moved to (for example: Spam).

Here you can choose whether everything should be moved to the spam folder. But you can of course also choose to use a different folder for a particular sender.

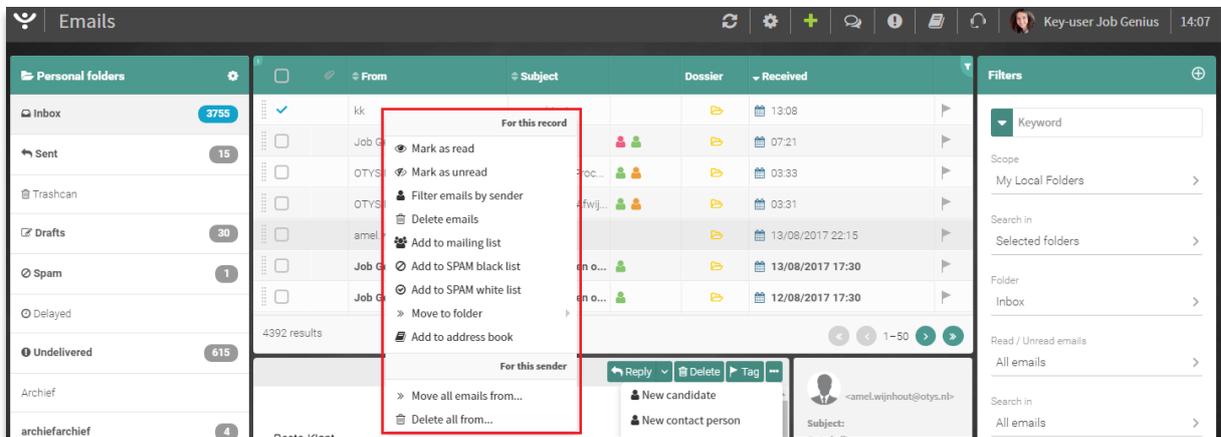


Fig. 28 - Right mouse button menu batch actions