QUICK GUIDE

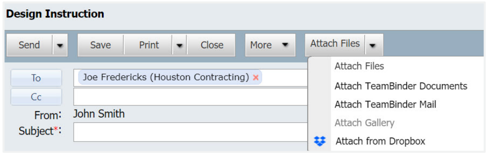
MAIL BASICS (CLASSIC)

InEight® DOCUMENT

CREATING MAIL

1. Click **New** then **Mail** and choose mail type.

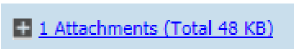
2. Type name(s) into recipient field(s).
3. Click the arrow next to Attach Files to choose attachment(s) by file type.



4. Enter subject and message details.
5. Complete all other required fields such as:
   a. Response required by date
   b. Status
   c. Discipline/Location/Area
6. Click **Send**.

RESPONDING TO MAIL

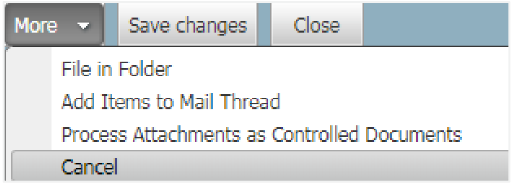
1. Access new mail via the notification email, Dashboard or Inbox.
2. Double click to open mail from Inbox.
3. Click **+** to expand the attachment window.



4. Click the **download** link.
5. Choose **Reply/Forward** option.
6. Enter message and click **Send**.

CANCELLING MAIL

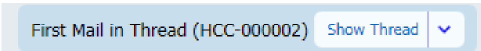
1. Click **Sent Items**.
2. Open mail to be cancelled.
3. Select **More** > **Cancel**.



4. Select the mail and provide a reason for cancelling.
5. Click **OK**.

ACCESSING MAIL THREADS

1. Click on the  icon next to mail in the mail register to open the corresponding mail thread, or;
2. Select **Show Thread** option top right.



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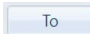
UPDATING MAIL STATUS

Mail status can be changed using any of the following methods:

1. From the mail creation screen update the status field or choose **Send and Close Out** from the drop down next to **Send**.
2. Open sent or received mail and update the status field found beneath the mail item.
3. Go to **Settings** > **User Preferences** and select the Status tab to set automatic status rules.
4. Change the mail thread status when prompted (if changing the status of the original mail item in a thread).

ADDING RECIPIENTS (ADDRESS BOOK)

1. From the mail creation screen select **To:** 
2. Filter by company.

3. Select Contact(s) and use the arrows to allocate them to the To or CC field.
4. Click **OK** once complete.

ADDING CONTACT GROUPS

1. From the mail creation screen select **To:**
2. Select the radio button next to Individual contacts.

3. Follow the same steps as per adding recipients via the Address Book.