

Inbox Buttons



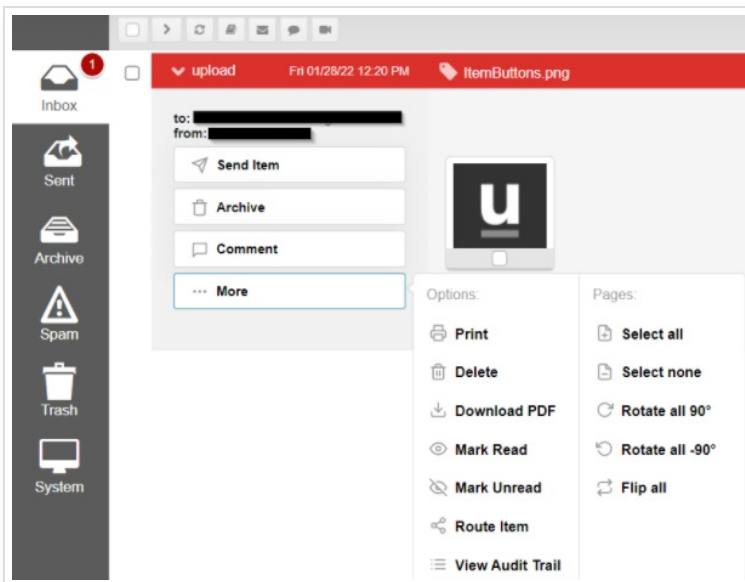
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Overview

The new “Inbox Buttons” feature now grants users the ability to choose which action buttons are present next to an item and the order in which they are listed. This enhancement allows for optimization specific to each account’s workflow.

The release *will not* affect current workflow until an Admin makes any change(s) within the settings.

Accounts can now tailor the inbox to their needs, rather than the other way around. Previously hidden buttons (such as “Route Item”) can now be accessed in less clicks. In addition, the redesigned interface for the Inbox Buttons provide easier navigation and are more visually appealing.



Customizability is only available to Updox Admins, although any change(s) made will be reflected within the Inbox for all Users.

The “More” Button

“Actions” has been renamed to “Pages”

Buttons listed under the “Actions” button only affected items containing pages or attachments. With the interface being updated, we found a perfect opportunity to update the button title to better suit the actual capabilities of those actions.

The previously named “Options” and “Actions” buttons have been condensed to a single button labeled “More” to eliminate the chance of a User forgetting which of those two buttons contains the button they intend to use. When “More” is clicked, the additional options will appear on the right hand side showing “Options” and, the now named, “Pages.”

“Options” Panel

The “Options” panel will include any items that have not been selected to be displayed. These hidden items also have the ability to be re-ordered.

“Pages” Panel

The “Pages” panel will only appear when the item contains attachments since these actions can only be performed when those are present.

How to: Customizing the Inbox Buttons

Only Updox Admins have access to changing these settings. They are located within Updox under:

Menu → Admin → Inbox Buttons. (7th option from the top)

Showing and Hiding Inbox Buttons

The checkboxes, highlighted in the Red Rectangle, indicate whether or not the item will appear without clicking the “More” button.

- **If the item is checked:** The button listed to the right of the checkbox will appear when an inbox item is expanded.
- **If the item is unchecked:** The button listed to the right of the checkbox will *not* appear when an inbox item is expanded. Instead, *it will be found under the “More” button.*

Changes Update in Real-Time

Anytime a change is made (ex. unchecking an item) the Inbox will automatically reflect the change that was made. You will *not* need to click a “save” button or refresh the Inbox to confirm the change(s).

Auto-Hiding Buttons

Certain Inbox Buttons will only appear when the Item Type warrants the need for it.

Inbox Buttons
Manage how items in the folders appear

Customize the order of the buttons in the inbox by dragging and dropping, and use the checkboxes to configure which buttons are always visible and which buttons are accessed via the "More" dropdown.

Note: Unchecked options will still be shown under the "More" dropdown for each item.

<input checked="" type="checkbox"/>	Send Item	≡
<input checked="" type="checkbox"/>	Reply	≡
<input checked="" type="checkbox"/>	Fax Back	≡
<input type="checkbox"/>	Resend Fax	≡
<input type="checkbox"/>	Resend Secure Link	≡
<input checked="" type="checkbox"/>	Archive	≡
<input type="checkbox"/>	Comment	≡
<input type="checkbox"/>	Print	≡
<input checked="" type="checkbox"/>	Delete	≡
<input type="checkbox"/>	Download	≡

← Back

Heads Up!

Updox recommends **only selecting up to six (6) buttons to be shown at a time** to prevent extremely large side panels when expanding an item. Our system is capable of showing additional buttons, although workflow may be negatively affected.

Re-Ordering the Inbox Buttons

Using the "double bar" icon, highlighted in the Blue Rectangle, allows the User to drag and drop the item(s) to change the order the buttons appear.

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<input checked="" type="checkbox"/>	Reply	≡
<input checked="" type="checkbox"/>	Fax Back	≡
<input type="checkbox"/>	Resend Fax	≡
<input type="checkbox"/>	Resend Secure Link	≡
<input checked="" type="checkbox"/>	Archive	≡
<input type="checkbox"/>	Comment	≡
<input type="checkbox"/>	Print	≡
<input checked="" type="checkbox"/>	Delete	≡
<input type="checkbox"/>	Download	≡

← Back

Checked (Shown) Items

- The ordering of **checked** items will only affect **other checked items** due to being placed in a separate location from unchecked items.

- The Inbox Buttons will appear in the same order they are set within the settings' panel.

Unchecked (Hidden) Items

- The ordering of **unchecked** items will only affect **other unchecked items**.
- Re-ordering these items will be reflected within the “More” button.
 - Again, if the button cannot be used due to the item type, the intended order will remain the same minus the auto-hidden buttons.

Additional Information

“More” Button is Hidden

- **Item w/out Attachments**

- In theory, a customer *can* select all buttons to always be shown. In the event that they do, please note, the “More” button will *not* appear for items *without attachments*.
- Since every button is set to “always show,” the “More” button will only be present with the “Pages” panel when applicable.

- **Item with Attachments**

- If there are attachments within the item, the “More” button will appear, but only the “Pages” panel will be presented.

