

Email folders Tracker Field

Email Folder is a new Tracker field type, introduced in [Tiki23](#), being able to hold a list of emails in flat format or IMAP folder-like structured support for Inbox/Sent/Trash folders.

Emails are currently moved to tracker items via the Webmail interface in Tiki (Cypht web interface). Cypht is used to display Tiki-stored messages and handle all relevant actions - read, reply, forward, copy, move, delete. Message can be moved to another tracker item or to an IMAP folder.

[Recording of demo at October 2021 round table](#)

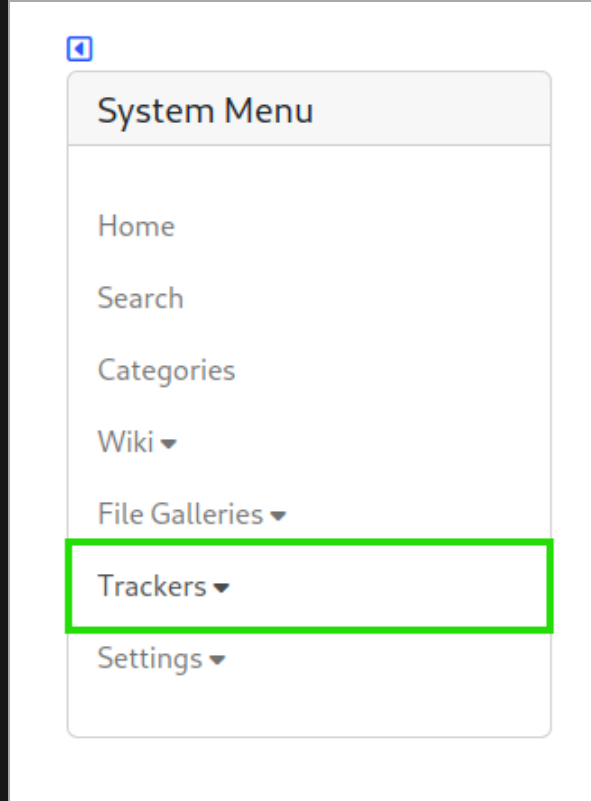
1. Configuration

To configure the email folders tracker field, do the following:
First of all you have to create a tracker. To create a tracker, proceed as follows:

1.1. CREATION AND CONFIGURATION OF THE TRACKER

1.1.1. CHECK THE ACTIVATION OF THE TRACKERS FEATURE

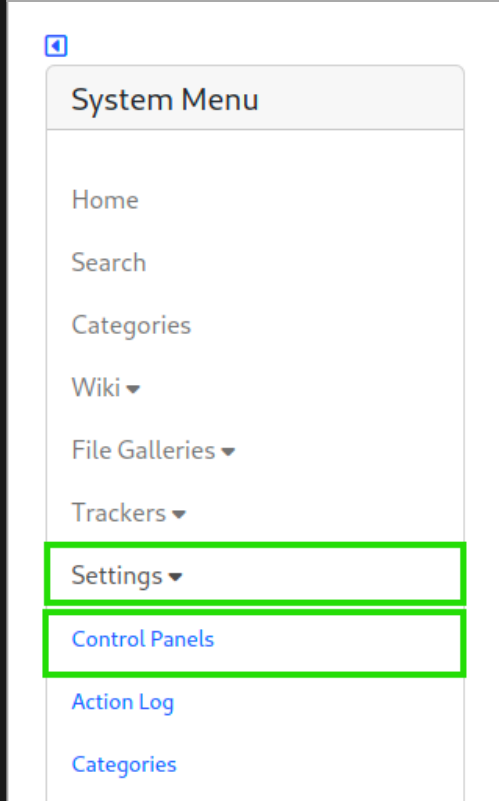
If the Tracker tab exists in the system menu go to the next point.



Click to expand

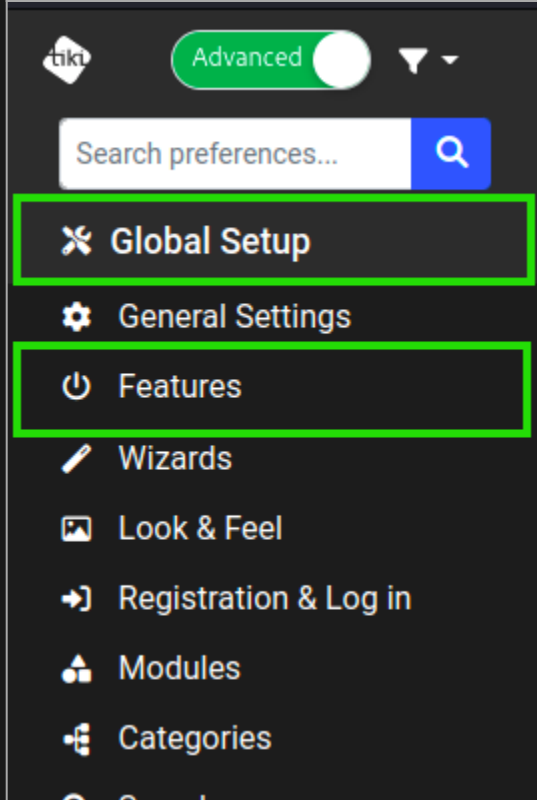
Otherwise if the Tracker tab does not exist, so the feature is not yet activated, you can activate it by following the following steps :

- Settings -> Control Panels



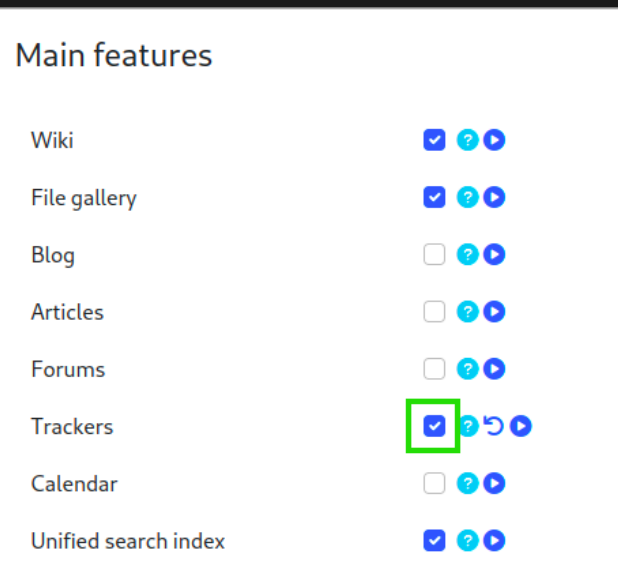
Click to expand

- Global Setup -> Features



Click to expand

- In the Main features section, check the Trackers box

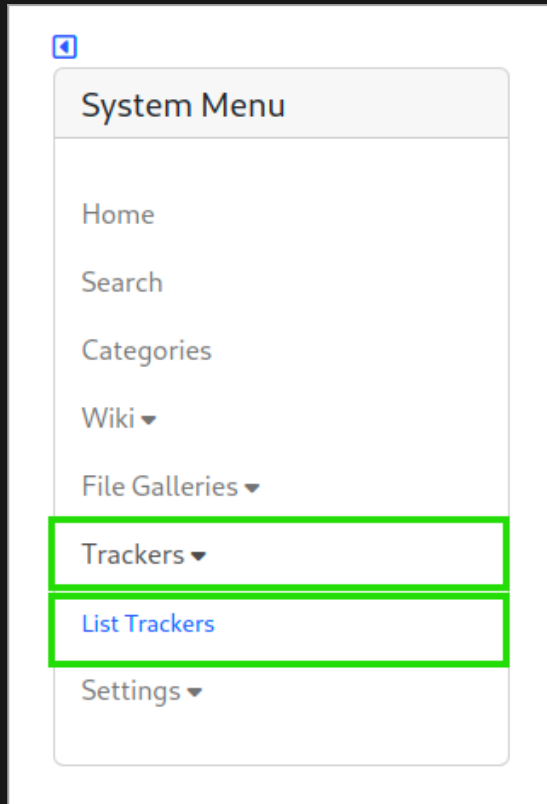


Click to expand

1.1.2. CREATE A TRACKER

To create a Tracker click on:

- Trackers -> List Trackers



Click to expand

- Create

Trackers

+ Create

Duplicate

Import ▾

Find...

Find

Click to expand

- Enter the name of the Tracker

Create Tracker ×

General

Name

Email Tracker

Description

Description is wiki-parsed

Field Prefix

nametracker

Click to expand

- Add a description if possible

Create Tracker ×

General

Name
Email Tracker

Description
Tracker for the movement of mails

Description is wiki-parsed

Field Prefix
emailtracker

Click to expand

- Finally save

Section Format

Status

Notifications

Permissions

Categories

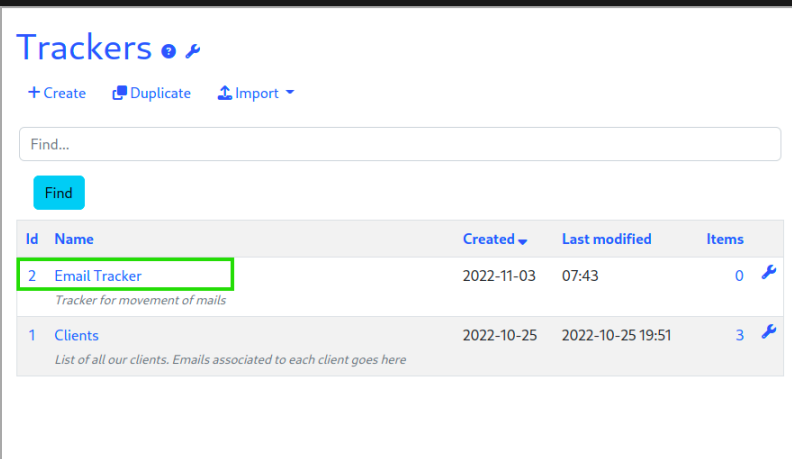
Close **Save**

Click to expand

1.1.3. ADD FIELDS

Once the tracker is created. Click on :

- the Tracker you just created



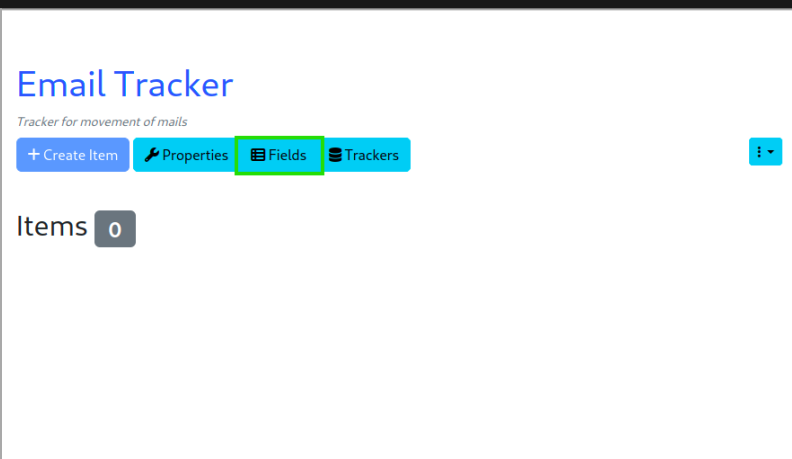
The screenshot shows a 'Trackers' management page. At the top, there are buttons for '+ Create', 'Duplicate', and 'Import'. Below is a search bar with 'Find...' and a 'Find' button. A table lists two trackers:

Id	Name	Created	Last modified	Items
2	Email Tracker	2022-11-03	07:43	0
1	Clients	2022-10-25	2022-10-25 19:51	3

The 'Email Tracker' row is highlighted with a green border. Below the table, there are descriptive subtitles for each tracker: 'Tracker for movement of mails' for 'Email Tracker' and 'List of all our clients. Emails associated to each client goes here' for 'Clients'.

Click to expand

- then on the Field button



The screenshot shows the configuration page for the 'Email Tracker'. The title is 'Email Tracker' with the subtitle 'Tracker for movement of mails'. There are four buttons: '+ Create Item', 'Properties', 'Fields', and 'Trackers'. The 'Fields' button is highlighted with a green border. Below the buttons, it says 'Items 0'.

Click to expand

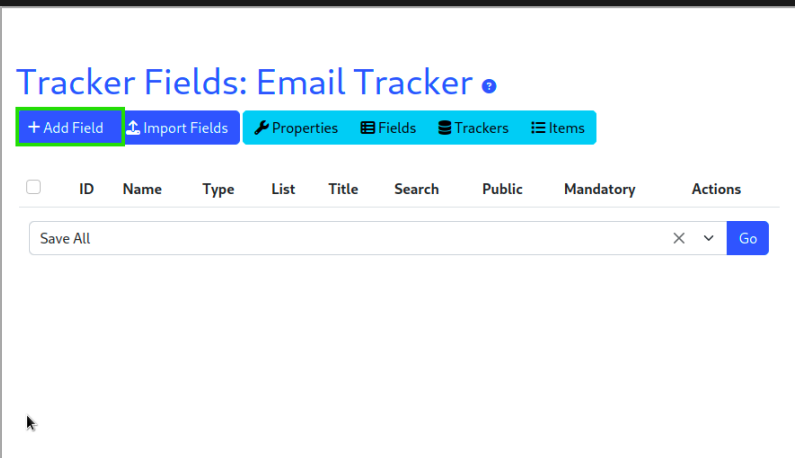
The minimal configuration needs two fields:

- the Text type field, which will serve as the description
- the Folder type field, which will be used to store emails

1.1.3.1. THE TEXT FIELD

Do it by clicking on:

- Add a field



Click to expand

- Enter the field name

Add Field ×

Name

Name

Type

Text Field × ▾

i More types available ×

More field types may be enabled from the **administration panel**.

Description

Description contains wiki syntax

Restrict visibility to administrators

Useful if you are working on a live tracker.

Close Add Field & Edit Advanced Options Add Field

Click to expand

- Choose the type of field, by default it is already Text Field

Add Field ×

Name

Name

Type

Text Field × ▾

i More types available ×

More field types may be enabled from the **administration panel**.

Description

Description contains wiki syntax

Restrict visibility to administrators

Useful if you are working on a live tracker.

Close Add Field & Edit Advanced Options Add Field

Click to expand

- Then validate by clicking on the Add a field button

Add Field ×

Name

Type
 × ▾

ⓘ More types available ×

More field types may be enabled from the **administration panel**.

Description

Description contains wiki syntax
 Restrict visibility to administrators
Useful if you are working on a live tracker.

Close Add Field & Edit Advanced Options Add Field

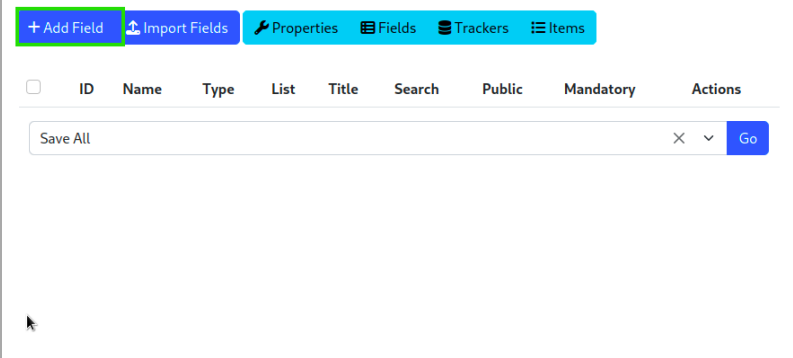
Click to expand

1.1.3.2. THE FOLDER FIELD

For the folder type field, click on:

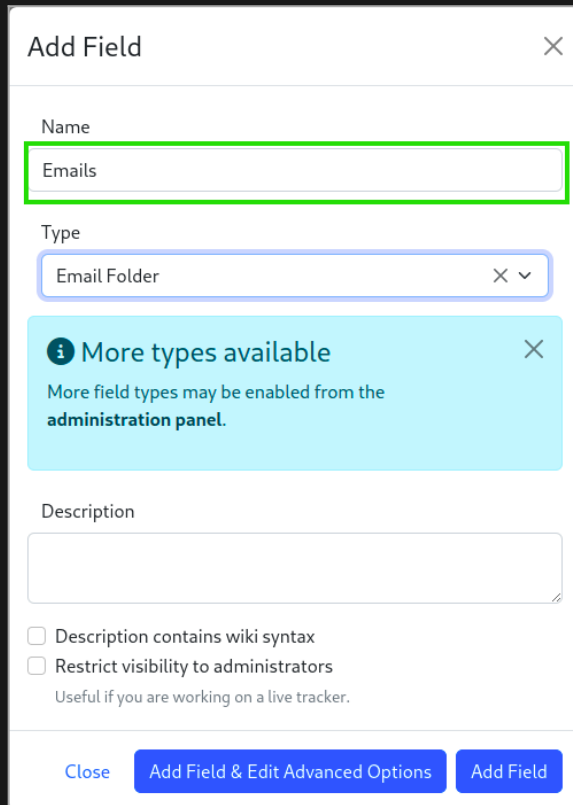
- Add a field

Tracker Fields: Email Tracker



Click to expand

- Enter the field name



Click to expand

- Choose the field type, you must choose Email Folder

Add Field ×

Name

Emails

Type

Email Folder × ▾

i More types available ×

More field types may be enabled from the **administration panel**.

Description

Description contains wiki syntax

Restrict visibility to administrators

Useful if you are working on a live tracker.

[Close](#) [Add Field & Edit Advanced Options](#) [Add Field](#)

Click to expand

- Click the Add Field & Edit Advanced Options button

Add Field ×

Name
Emails

Type
Email Folder × ▾

i More types available ×
More field types may be enabled from the **administration panel**.

Description

Description contains wiki syntax
 Restrict visibility to administrators
Useful if you are working on a live tracker.

Close **Add Field & Edit Advanced Options** Add Field

Click to expand

- Click the Options for Email Folder button

Name

Emails

Description

Description contains wiki syntax

Options for Email Folder

Validation

Permissions

Advanced

Close Save

Click to expand

- In the Gallery ID field, select the option File Galleries > Emails

Options for Email Folder

Associate email messages with tracker items.

Gallery ID

File Galleries > Emails X ▾

File gallery to upload new emails into.

Use Folders

No X ▾

Use separate folders like Inbox, Sent, Trash, Archive.

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

Exclude data and changes from email notifications

No X ▾

Data and changes to this field are not included in email notifications.

Click to expand

- In the field Use Folders select Yes, other fields are added below for the configuration of the names of the folders. You can leave it like this

Options for Email Folder

Associate email messages with tracker items.

Gallery ID
File Galleries > Emails X ▾

File gallery to upload new emails into.

Use Folders
No X ▾

Use separate folders like Inbox, Sent, Trash, Archive.

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

Exclude data and changes from email notifications
No X ▾

Data and changes to this field are not included in email notifications.

Click to expand

- And finally Validate by pressing Save

Compose Page

Name of the wiki page where compose button will direct to. Leave empty for default Webmail page.

Exclude data and changes from email notifications

No

Data and changes to this field are not included in email notifications.

Validation

Permissions

Advanced

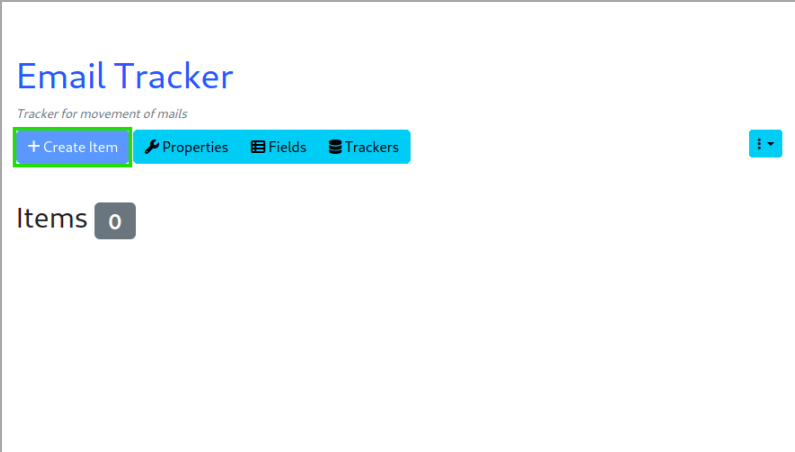
Close

Click to expand

1.1.4. ITEM CREATION

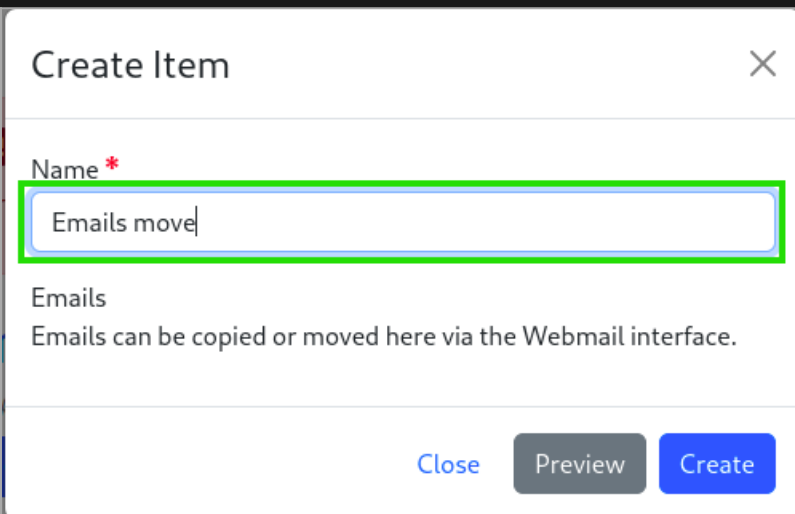
Once the configuration is complete, you must create an item. For this on the item page :

- click on the Create Item button



Click to expand

- A modal window is launched, enter the Name in the Name field and validate

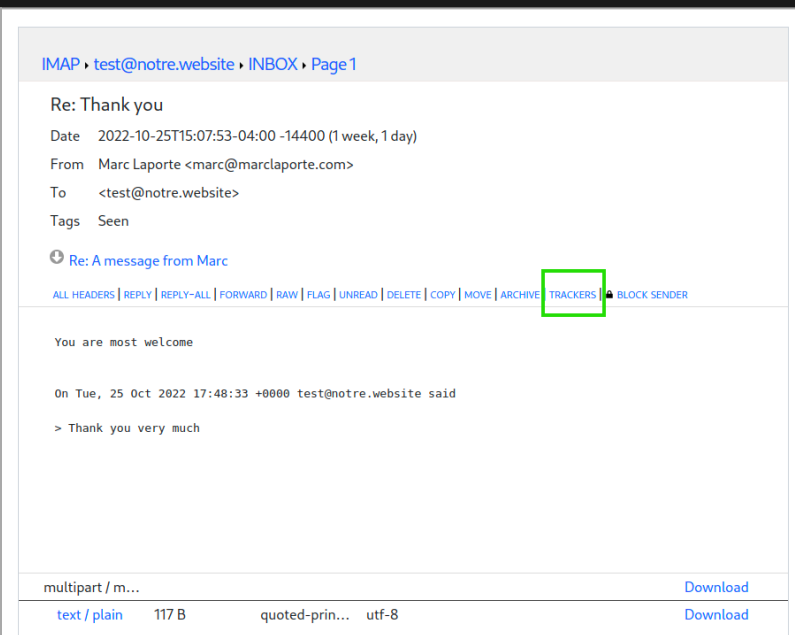


Click to expand

2. Move emails to trackers

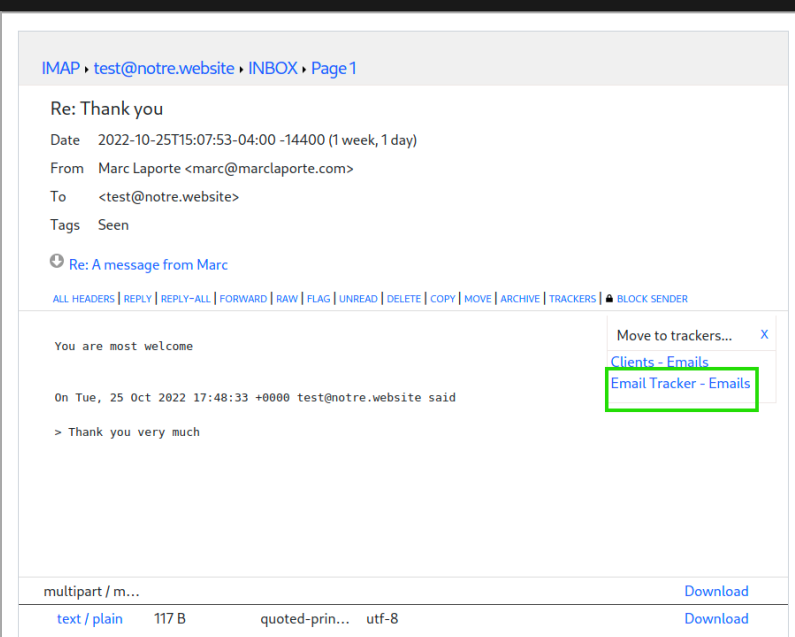
To move an email, open the email you want to move :

- Click on the Tracker button



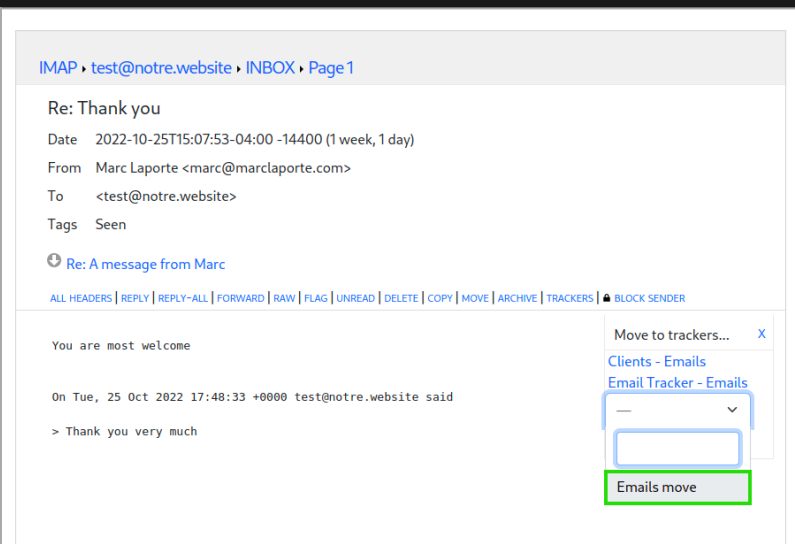
Click to expand

- In the small window select the Tracker you created



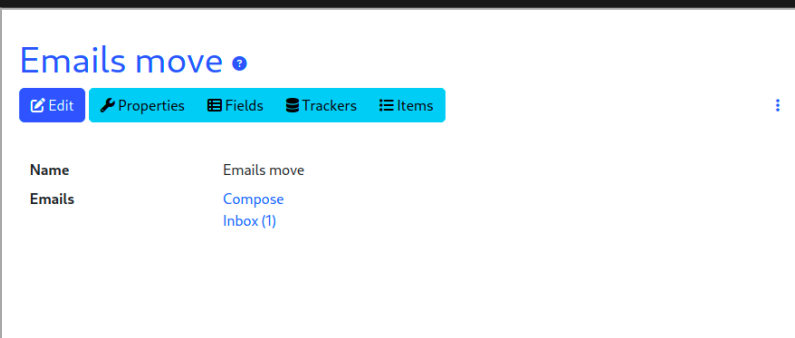
Click to expand

- Finally select the folder.



Click to expand

- Once done, here is the end result



Click to expand

Related:

- [Selector Tracker Fields](#)
- [Adding fields to a tracker](#)
- https://gitlab.com/tikiwiki/tiki/-/merge_requests/818
- [Email as a first-class citizen](#)

Alias

- Email folder Tracker Field

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