



Create a New Contact

Help Documentation

Creating New Contacts

There are several ways to add new contacts to SmarterMail, depending on whether you want to add a contact from an email message, import contacts from another provider or add a contact by manually typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, simply view the desired message. SmarterMail includes "touch and go" functionality that highlights all email addresses in the header of the message. By clicking on a highlighted address, a small window opens with a few options:

- Email - Opens a pop out window so you can send a new message to this address.
- Add Contact - Opens a pop out that allows you to create a new Contact based of this email address.
- Invite to Event - Opens a pop out that allows you to create a new Appointment, with this person added as an Attendee automatically.
- Trust Sender - Adds the address to your Trusted Senders list, meaning any future emails from this address will bypass most antispam options enbaled for the server. (NOTE: SPF and DKIM still run against any address in the Trusted Senders list to prevent phishing.)
- Block Sender - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted.
- Create Filter - This options opens the Content Filtering area. Here, you can use information contained within the email message, such as the From Address, Subject, etc. and create a new Content Filter based off that information.
- Add Sender to Filter - This option opens a modal window that lists all of your existing Content Filters. You simply select the filter you want this sender added to, and they're immediately added.

To add a contact by typing the name and other information directly in SmarterMail, open up your Contacts and click the New button. This will open a new contact window that you will use to add the contact to SmarterMail.

For information on adding new contacts by importing contacts from another email service, see [Importing and Exporting Contacts](#) .

Saving Contact Details

When you add a new contact to SmarterMail, you can save as many or as few details about the person as you like. In general, contact details are separated using various cards. These include:

- **Personal Info** - These are the "personal" details of your contact, including their display name, title (Mr., Mrs., etc.), first name, middle name, last name, their personal website (or "home page"), and birthday. You can also add a photo, avatar or icon for your contact by simply clicking on the grey circle next to the contact's Display Name. This picture is available within the webmail interface and for anyone using CardDAV or the EAS add-on to sync their contacts with email clients and/or mobile devices. Unfortunately, pictures will not sync for customers using Add to Outlook for synchronization. Note: The Display Name is the only required field to save a contact.
- **Phone Numbers** - You can add one or more phone numbers associated with your contact, like their home phone, mobile number, etc.
- **Email Addresses** - Just as with phone numbers, you can add one or more email addresses for your contact. If a contact has more than one email address, you can select which address to send to when typing the contact's name in the TO: field for a new message.
- **Home Address** - The contact's home address.
- **Work Info** - The contact's place of work, including their work Title (CEO, Marketing Director, etc.), should they have one, their company's website address, etc.
- **Work Address** - The street address, city, state and zip for the contact's place of business.
- **Categories** - Categories are a great way to organize your contacts. Using categories, you can organize business, personal or any other type of contact into tidy circles, keeping people separated based on whatever criteria you want. Contacts can be in multiple categories or none: It's up to you. Note: Categories are only a way to organize contacts. They are NOT ways to send emails to a group of individuals. For that you would want to create an Alias or use SmarterMail's Mailing List feature.
- **Other** - Additional pieces of information about the contact such as their nickname, their spouse's name, their assistant's name, etc.