



Contacts Overview

Help Documentation

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SmarterMail features an online contact manager that helps users organize and communicate with the people in their life. Users can view and manage their contacts from any computer with Internet access, anywhere in the world, using the webmail interface.

To access your contacts, click the contacts icon . By default, the contacts in My Contacts will load. To view different contact lists (such as the Global Address List, shared lists, or mapped resources), click the Contacts menu at the top of the navigation pane and select the contact list you want to view.

For help understanding the different areas of the contacts section, see the contacts interface diagram .

Navigating Your Contacts

When you view your SmarterMail contacts, the page is divided into three sections:

- The navigation pane displays the contacts in the list you are viewing. To view details for a specific contact, simply click the desired contact.
- The content pane displays all available details about the selected contact.
- The preview pane displays a list of the most recent messages, appointments, chats and attachments related to the selected contact.

In general, the following options are available from the navigation pane toolbar:

- New - Creates a new contact.
- Actions - Click this button and select the appropriate option to delete contacts, send email to contacts, import/export contacts, or add the contacts to Outlook.
- Select All - Selects all contacts in the list you are viewing.
- Delete - Deletes the selected contact(s).
- Send Email - Addresses an email message to the selected contact(s).
- Send vCard(s) - Allows you to send an email with the the selected contact(s) electronic business card(s) (vCard) attached.
- Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes contact information. Note: This feature is only available in SmarterMail Enterprise.
- Import/Export - Import or export some or all of your contacts in vCard or comma separated value (CSV) format. For more information, see [Importing and Exporting Contacts](#) .
- Import - Allows you to import contacts from another email system into your contact database. SmarterMail can bulk import contacts in either vCard or CSV format.
- Export to vCard - Exports only the selected contact(s) in vCard format.
- Export all to vCard - Exports all of your contacts in vCard format.

- Export to CSV - Exports only the selected contact(s) in CSV format.
- Export all to CSV - Exports all of your contacts in CSV format.
- View - Click this button and select the appropriate option do filter contacts by category, sort contacts, or choose the details (Visible Fields) that are displayed about a contact in the navigation pane.
- Filter - Filters contacts by the selected category. Categories are created when you add new contacts to your address book. For more information, see [Creating New Contacts](#) .
- Sort - Sorts contacts by display name, email, or company in ascending or descending order.
- Visible Fields - Choose which contact details are displayed in the navigation pane.

In general, the following options are available from the content pane toolbar:

- Edit - Edits the selected contact.
- Delete - Deletes the selected contact. Note: When accessing the Global Address List, the ability to delete contacts depends on the permissions granted. For example, if the GAL is read-only, the delete button will not appear.
- Download vCard - Saves the contact information as an electronic business card, which can later be imported to another program such as Outlook or sent through email as an attachment.

Viewing Items Related to a Contact

To help users better understand their relationships and communications with each contact, SmarterMail automatically displays a list of recent messages, appointments, attachments and live chats related to each contact. This information can be found in the related items grid in the preview pane.

In general, the following options are available from the preview pane toolbar:

- Open - Opens the selected message, appointment, attachment or live chat related to the contact.
- Delete - Deletes the selected message, appointment, attachment or live chat related to the contact.

To perform a basic search of the related items listed for a contact, type the search criteria in the search bar located near the top of the preview pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the related items for matches and display the results in the related items grid. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."