Contacts

Help Documentation

Contacts

Contacts Overview

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 . To view different contact lists (such as the Global Address List, shared lists, or mapped resources), use the Contacts Selector at the top of the navigation pane and select the contact list you want to view. Depending on your overlay settings found in the View menu, you can view multiple contact lists together or toggle between views.

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.

• Overlay Contacts - When unchecked, adjusting the Contact Selector will toggle views rather than overlaying contact lists to view multiple resources at one time. Note: Due to the way the Global Address List (GAL) is generated, the Global Address List cannot be overlayed with the default Contact list or shared contacts.

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 "%."

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 typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, simply view the desired message either by double clicking on it or viewing it in the preview pane. 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 three options: Email, Add/Edit Contact and Block Sender. Click the Add/Edit Contact link and a new contact window opens up. SmarterMail will automatically complete the display name and email address fields, then you can enter additional details and save the contact.

To add a contact by typing the name and other information directly in SmarterMail, click New in the navigation pane toolbar and then click Contact . This will open a new contact window that you will use to add the contact to SmarterMail. In addition, you can create a new contact within the Contacts section of 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 divided into five sections:

   • Personal Info - Type the contact's display name, title, first name, middle name, last name, suffix, email address(es), instant messenger, home page, and date of birth. Note: The display name is the only required field to save a contact.

   • Add a Picture - SmarterMail allows you to upload a picture for any contact in your address book. These pictures are available within the webmail interface and for anyone using CardDAV or the Microsoft Exchange ActiveSync add-on to sync their calendars with email clients and/or mobile devices. Unfortunately, pictures will not sync for customers using Add to Outook or SyncML for synchronization.

• Contact Info - Type the contact's home phone number, work phone number, mobile phone number, pager number, home and work fax numbers, and home address.

• Work Info - Type the contact's company name, job title, department, office, work address, and website URL.

• Additional Info - Type any additional details about the contact.

Master 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.

• To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

Searching Contacts

If you have a large number of people in your contacts list, finding a specific contact can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find contacts quickly and easily.

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

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see Advanced Search Overview .

Importing and Exporting Contacts

Because people often have multiple email accounts from different providers, SmarterMail makes it easy for users to securely transfer contacts to and from other online address books.

Importing Contacts to SmarterMail

SmarterMail supports importing contacts from two different types of files: vCards (.vcf) and comma-separated text files (.csv). SmarterMail also supports importing from a .zip file containing any

combination of these file formats. For step-by-step instructions on importing contacts to SmarterMail, please refer to the KB article How To Import Contacts to SmarterMail .

Exporting Contacts from SmarterMail

Contacts can be exported individually in vCard or CSV format or in bulk as a .zip file containing either vCard or CSV files. These files can then be imported into Microsoft Outlook or into another SmarterMail account. For step-by-step instructions on exporting contacts from SmarterMail, please refer to the KB article How To Export SmarterMail Contacts .

Sending Contacts from SmarterMail

SmarterMail also allows users to email contact data as vCard files. For step-by-step instructions, please refer to the Kb article How To Send a Contact as a vCard .

Global Address List

The Global Address List, sometimes referred to as the "GAL," is most commonly identified with Microsoft Exchange. The GAL is essentially a directory service within SmarterMail that contains a dynamic list of all contact information for every user on your domain. While individual mailboxes are contained within the GAL, domain administrators can futher manage what's included in the GAL in order to hide users that may not represent real people, such as a support@example.com alias and/or mailing lists.

Contact information for the Global Address List is pulled from the individual account profiles of users. To update your listing, click the settings icon . Then expand the My Settings folder and click Account Profile in the navigation pane.

Note: If the Global Address List is enabled for your domain, all information you enter into your profile can be seen by all other members of your domain.

The Global Address List functions almost identically as My Contacts.