



Linking Email to Tasks

Help Documentation

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Email exchanges can often result in the need to create one or two more tasks. For example, an email exchange with a vendor may require updates to price sheets or shipping requirements. Perhaps an email from a significant other mentions an upcoming birthday or anniversary. Because of this, SmarterMail includes the ability to create a new task right from within an email message. This is called "linking" an email message to a task.

To link a task to a message, first you'll want to open and view the desired message. From the preview pane, click the Add menu and then click Task . This will open a new task window that you will use to create the task. Once the new task has been saved, a tasks tab will display at the top of the message window. Clicking on this tab will allow you to see all the tasks that are linked to the message.

Finding Messages with Linked Tasks

To quickly view all emails that are linked to tasks, expand the By Type treeview menu option at the bottom of the navigation pane and click Linked to Tasks to display all messages that also have tasks attached to them.