



Contacts

Help Documentation

Contacts

Contacts Overview

SmarterMail allows you to keep not only the email addresses of all of your important contacts, but all of their other information as well. All contact information, like all features of SmarterMail, is accessible through the web interface from anywhere on the internet. Some features of Contacts in SmarterMail include:

- Contact lists can be imported to, and exported from, SmarterMail in multiple formats.
- Quick-add contacts to emails.
- Easy searching of contacts.
- Integration with Outlook (Enterprise Edition Only) .

To get started, click on the Collaborate button on the main toolbar, then select the Contacts control bar in the left pane.

Manage Contacts

The My Contacts page lists all of your contacts and lets you perform many actions, like searching or composing new email. View your contacts by clicking on My Contacts under the Contacts tree in the sidebar.

Edit a Contact - Click on the name of a contact to edit it.

Delete a Contact - To delete a contact, click on the delete link next to it, or check the contacts you want to delete and choose Delete Selected Contacts.

Search Contacts - Click on the Search button to begin searching for contacts. A second bar will appear that will allow you to search.

Sending an Email to a Contact - Click on the new message link next to a contact to send them an email, or choose multiple users and choose New Message to Selected Contacts from the Actions menu.

Export Contacts - For information about exporting contacts, see [Exporting Contacts](#) .

Import Contacts - For information about importing contacts, see [Importing Contacts](#) .

Integrating with Outlook (Enterprise Edition Only) - If you have Enterprise Edition, you can use SmarterMail as a connector to Outlook so that your contacts in SmarterMail appear in Outlook and are automatically synchronized. For more information, please refer to the help topic [Outlook Integration](#) .

Sharing Contacts with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic [Sharing Your Own Resources](#) .

Create a New Contact

There are two methods of adding a new contact:

- Click the Collaborate button on the main toolbar, then click the Contacts control bar, and finally click New Contact from the left tree view; or
- Click the Collaborate button on the main toolbar, then click the Contacts control bar, then click All Contacts from the My Contacts tree view, and finally click the New icon from the actions toolbar.

For ease of use, the contact page is separated into tabs that group related information. This information is outlined below.

Personal Info

- Display Name
- Title (Mr./Mrs./etc.)
- First Name
- Middle Name
- Last Name
- Suffix
- Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers
- Fax Numbers
- Address Information

Company Info

- Company Name
- Job Title
- Department
- Office

- Address Information
- Website

Categories

- Select which category or categories you would like to add this contact to
- To add a category simply click the Master Categories button and add comma(,) separated categories to the list

Exporting Contacts

Contacts can be exported in an easy fashion in SmarterMail. When viewing a contact list like All Contacts or the Global Address List (Enterprise Only) , move your mouse over the Import/Export button. Choose one of the options from the drop down list—export all contacts or just the selected ones.

Contacts are downloaded as a zip file containing vCard files. These files can be imported into Outlook or back into another SmarterMail account using Import Contacts .

To import contacts into Outlook, just drag one or more vCard files into your contact list in Outlook and confirm each one by clicking on Save and Close for each one.

Importing Contacts

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 files.

Importing vCard or zipped vCard files

- Click All Contacts from the My Contacts tree view.
 - Move your mouse over the Import/Export icon from the actions toolbar and choose Import Contacts .
 - Link to the file you wish to upload and click on OK .
 - If any conflicts occur, you will be asked to resolve them by performing one of the actions below:
 - Add as a New Contact - As it states, this option adds a completely new contact record with the information in the vCard.
 - Replace Existing Contact - Replaces the contact in the box with the new one being uploaded.
- To examine the properties of the close match contacts, hover your mouse over the magnifying glass icon in the list at the bottom of the page.

- Skip this Contact - Jumps over this contact and does not perform an action.
- Once all conflicts are resolved, the process is complete.

Importing CSV or zipped CSV files

- Click All Contacts from the My Contacts tree view.
- Move your mouse over the Import/Export icon from the actions toolbar and choose Import Contacts .
- Link to the file you wish to upload and click on OK .
- Map the contact fields from your CSV to SmarterMail fields by choosing them from the dropdown boxes.
- If any conflicts occur, you will be asked to resolve them by performing one of the actions below:
 - Add as a New Contact - As it states, this option adds a completely new contact record with the information in the vCard.
 - Replace Existing Contact - Replaces the contact in the box with the new one being uploaded. To examine the properties of the close match contacts, hover your mouse over the magnifying glass icon in the list at the bottom of the page.
 - Skip this Contact - Jumps over this contact and does not perform an action.
 - Once all conflicts are resolved, the process is complete.

Global Address List

This feature is available in Enterprise Edition only

The Global Address List, sometimes referred to as "GAL", is a dynamic list containing all users on your domain. The Global Address List can be managed by your domain administrator in order to hide users that may not represent real people (like support@example.com, for example).

Contact information for the Global Address List is pulled from individual profiles of users. To update your listing, click on the Settings button, click the Settings control bar in the left pane and choose Account Profile in the My Settings tree.

Note: All information you enter into your profile can be seen by all other members of your domain.

The Global Address List functions in a way almost identically to My Contacts.

Integration with Outlook TM (Outlook is a trademark of Microsoft and all references in this help recognize this trademark.)

This feature is available in Enterprise Edition only
--

Calendars and contact lists can be loaded into Outlook and displayed side-by-side with your existing Outlook calendars and contacts. This allows you to see your current appointments and contacts from SmarterMail right in Outlook.

To enable the connection, you must first have Outlook installed and available to your user account.

- In SmarterMail, navigate to the calendar or contact list you wish to connect.
- Click on the Add to Outlook icon from the actions toolbar.
- A popup window will appear with additional instructions. Click OK to initiate the connector.
- A security popup will appear from Outlook, explaining that an external source wants to attach to Outlook. Click on Yes to allow the connector to attach.
- The resource is now available in Outlook.

Note: If you change the password on your email account, the connections will be broken and will have to be reestablished.

SmarterMail Sync

SmarterMail Sync is an on-demand synchronization tool. After installing it, a toolbar will be added to your copy of Microsoft Outlook that will allow you to easily synchronize with SmarterMail whenever you need. [More Info on SmarterMail Sync.](#)

Sharing

Sharing a resource, such as a calendar, contacts, notes, tasks, or e-mail folders, will allow the users you specify to access the resource with a pre-determined permission level. [More Info on Shared resources.](#)