



# Contacts

Help Documentation

# Contacts

## Contacts Overview

SmarterMail's contacts feature is 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 an Internet access, anywhere in the world.

To access your contacts, click the contacts icon . By default, the contacts in My Contacts will load.

Note: To view different contacts 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 desired list.

For help understanding the different areas of the contacts section, see the contacts 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, and attachments related to the selected contact.

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

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- 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).
- 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 .vcf format. For more information, see [Importing and Exporting Contacts](#) .
- View - Click this button and select the appropriate option do filter contacts by category, sort contacts, or choose the details that are displayed about a contact in the navigation pane.

- Filter - Filters contacts by the selected category.
- 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.
- 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, and attachments related to contacts. 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, or attachment related to the contact.
- Edit - Edits the selected appointment related to the contact.
- Delete - Deletes the selected message, appointment, or attachment 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.

## 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, view the desired message in the preview pane. Then click the From field in the header of the message. The sender's email address and a link to add the sender to your contacts list will display. Click the link to open a new contact window. SmarterMail will automatically complete the display name and email address fields, but 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 **New Contact** . 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 much 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, instant messenger, home page, and date of birth. Note: The display name is the only required field to save a contact.
- **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.
- **Categories** - A category provides a way to organize your contacts into manageable groups. 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 the contacts list you are viewing for matches and display the results in the navigation pane.

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [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 files. 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 are downloaded as a .zip file containing vCard 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](#) .

## Global Address List

This feature is only available in SmarterMail Enterprise.
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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, such as [support@example.com](mailto:support@example.com).

Contact information for the Global Address List is pulled from individual 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.