



Contacts Overview

Help Documentation

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 - 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).
- 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.