



# Collaborate

Help Documentation

# Collaborate

## 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, refer to the KB article [How To - Export SmarterMail Contacts](#) .

Import Contacts - For information about importing contacts, refer to the KB article [How To - Import Contacts to SmarterMail](#) .

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 see [Synchronization Overview](#) .

## 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

## Global Address List

This feature is only available in SmarterMail Enterprise.

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.

Contact information for the Global Address List is pulled from individual profiles of users. To update your listing, click the Settings button in the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and click Account Profile in the left tree view.

Note: 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.

## Calendar

### Calendar Overview

Calendar allows you to store and retrieve appointment and meeting information from the same place as your email. SmarterMail's calendar system is very flexible and includes many options that can help you keep everything organized.

- Fully configurable appointments with optional recurrence rules.
- Email notification and notification within SmarterMail of upcoming appointments.
- Attendee and invitation status tracking.
- Availability information about attendees (Enterprise Edition only) .
- Integration with Outlook (Enterprise Edition only) .

To get started, click on Collaborate on the main toolbar, and then click the Calendar control bar in the left pane.

## My Calendar

To get started working with your calendar, click the Collaborate button on the main toolbar, and then click on the Calendar control bar in the left pane. There are three primary views of calendars in SmarterMail: Daily, Weekly, and Monthly. These views are very similar, but have a few differences, which are noted below.

- **Daily View** - The daily view is a planner-type view that shows all events during a day and also visually indicates when events overlap each other.
- **Weekly View** - This view is intended as more of an agenda-type view, showing all appointments that occur during a specific week.
- **Monthly View** - The monthly view shows a complete months' worth of appointments. It is meant more as an at-a-glance type of calendar that outlines a general idea of the upcoming events you have.

## Calendar Controls

The right side of the page shows you both the current month and next month, and indicates days where events are scheduled with bold font in a different color. A legend below the calendars shows what different colors and effects mean.

Changing the month or year on the right calendar will not affect the calendar on the left. This is intended so you can look through a month (and the month after it) without affecting your currently selected timeframe.

Clicking on the double arrow next to the day indicators in the calendar will make the displayed month the currently selected month and put the calendar into the Monthly view.

Selecting the single arrow next to a week will select that week and change the display to the weekly view.

Clicking on a day in the calendar will make that day the selection and change to daily view.

## Monthly, Weekly, and Daily View

The calendar view in the center of the page will change depending upon your date selection, as indicated above. These different views show data differently, but operate in the same manner.

- **Prev and Next** - Click these buttons to quickly select the next month, week, or day (depending on your current view mode).
- **Editing an Appointment** - Click on an appointment to edit its content.
- **Deleting an Appointment** - To delete an appointment, click on it, then click on the Delete

button.

- Sharing (Enterprise Edition Only) - Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share your calendar with another user on your domain.

## Create a New Appointment

There are two methods of adding a new appointment to a calendar:

- Click the Collaborate button on the main toolbar, then click the Calendar control bar in the left pane, and finally click New Appointment from the left tree view; or
- Click the Collaborate button on the main toolbar, then click the Calendar control bar, then select the calendar you want to view (Daily, Weekly, or Monthly), and finally click the Add Appointment icon from the actions toolbar.

For information about inviting attendees, please refer to the help topic [Inviting Attendees](#) .

### Appointment

The Appointment tab records the common information about the appointment. The available settings are explained below.

- Subject - This is the short description of the appointment, and is what will appear on calendar pages and reminders.
- Attendees - Enter the email addresses of the people who you want to have attend this event. You can click on the attendees link to pop up a window that lets you quickly add members of your contact list or Global Address List. You can also check your attendees' availability by clicking on the Availability link to the right of the box. (Enterprise Edition Only). Once you save your appointment, the attendees will receive an email invitation to the event. If they accept, you will receive a notification back. Additionally, if they accept from within SmarterMail, the event will get added to their calendar as an appointment.
- Location - The physical location of the appointment. This field is optional.
- Start Date and Time - Enter the start date of the event. If the event will go all day, check the "All Day Event" box. You may click the calendar and/or the clock to the right of the box to help with this.
- End Date and Time - If the appointment does not have a scheduled end time, you may leave the end time blank.
- Reminder - This will allow you to choose if you want to be notified with an email, and at what time before the event starts. For more information about reminders, please see the help topic

Reminders .

- Email Notification - Enter the email address that you would like notified of this appointment.

Note: Appointments will span multiple days and times if needed.

## Recurrence Information

A recurring appointment is one that will happen again at some future date, and usually follows a pattern. A good example of a recurring event is a birthday. For more information about this, please refer to the help topic Recurring Events .

## Description

Enter the full description of the appointment, if needed.

## Categories

You may select which category the event should belong to or uncheck them all to specify an event with no category. To add a new category click on the Master Categories button to bring up the categories popup You may add categories by either using a comma(,) to separate them or putting one category per line.

## Recurring events

SmarterMail's calendaring allows you to add events that recur over time. Recurring events can include:

- Personal Occasions (Birthdays, Anniversaries)
- Holidays
- Regular Meetings/Business Appointments
- Important Reminders (Seasonal Appointments)
- Much More

When adding an appointment, it can be converted to a recurring event by clicking on the Recurrence Information tab. Use the options on the tab to schedule how often an event recurs. Recurrence is very flexible, and can be as simple or as complex as you want. Examples include:

- A birthday that occurs every 7th of August.
- A meeting that happens the second Monday of every month.
- An appointment that occurs every 4 days for up to 3 weeks.

## Reminders

Reminders may be added to appointments in calendaring by setting the reminder drop-down box to a value other than None in the Appointments tab when making a New Appointment. When a reminder is

activated, a popup window will appear that reminds you of the event. At the bottom of the popup window you have the following options  Snooze, Dismiss All, Dismiss, and Close the Window.

You can also choose to activate an email reminder to send an email when the reminder activates. This can be your own email address, or can optionally be an alternate email address, like a cell phone SMS or pager email address.

## **Tasks**

### **Task List Overview**

SmarterMail allows you to store all of your tasks in a single place, accessible from the web wherever you are. Tasks can be used to store to-do's or important checklists. Some features of SmarterMail tasks are:

- Configurable start and due times.
- Reminders that show up in SmarterMail to alert you of the task due date.
- Completion status that tracks the percent done of the task.

To get started, click the Collaborate button on the main toolbar, and then select the Task control bar in the left side bar.

### **Manage Tasks**

The My Tasks page lists all of your tasks in one place and lets you sort and track them easily. To view your tasks, click the Collaborate button on the main toolbar, then click the Tasks control bar, and finally select All Tasks from the My Tasks tree view.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Task - Click on the subject of a task to edit it.
- Select the task you want to edit and click the Edit icon from the actions toolbar; or
- Right click the task you want to edit and select Edit from the drop down list; or
- Double-click the task you want to edit
- Deleting a Task - This can be accomplished two different ways:
  - Select the task you want to delete and click the Delete icon from the actions toolbar; or
  - Right click the task you want to delete and select Delete from the drop down list
- Searching Tasks - Click on the Search button to begin searching for tasks. A second bar will appear that will allow you to search.



## Create a New Task

To add a task to your task list, either click on New Task in the tree view on the left hand side, or click the New icon on the actions toolbar

If you wish to add a task to a shared task list (Enterprise Edition Only) , you must be viewing the list, then use the New icon from within the page.

### Details

- Subject - This is the short description of the task, and is what will appear on task pages and reminders.
- Date and Time - Enter the start date and time of the task, as well as the due date of the task. You may leave the due date or time blank to indicate that there is no due date.
- Reminder - If you wish to have a reminder appear in SmarterMail, choose the amount of time beforehand that you want it to show.
- Priority - Higher priority tasks are more important. In My Tasks, you can sort by priority.
- Status - Choose the status of the task. This will show up in My Tasks so that you can easily track the status of your items.
- % Complete - This indicates the percentage that the task is completed.

### Description

Enter the full description of the task, if needed.

### Categories

You may assign one or more categories to each note to make for easier searching.

- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

## Notes

### Notes Overview

SmarterMail allows you to store all of your notes in a single place, accessible from the web wherever you are. Notes can be used to store to-do's or important checklists. Some features of SmarterMail notes are:

- Several colors to choose from
- The ability to assign a category to a note

To get started, click the Collaborate button on the main toolbar, and then select the Notes control bar in the left side bar.

## Manage Notes

The My Notes page lists all of your notes in one place and lets you sort and track them easily. View your notes by clicking on My Notes under the Notes tree in the sidebar.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Note - This can be accomplished three different ways:
  - Select the note you want to edit and click the Edit icon from the actions toolbar; or
  - Right click the note you want to edit and select Edit from the drop down list; or
  - Double-click the note you want to edit
- Deleting a Note - This can be accomplished two different ways:
  - Select the note you want to delete and click the Delete icon from the actions toolbar; or
  - Right click the note you want to delete and select Delete from the drop down list
- To search your notes, click the Search icon on the action toolbar. This will open up a search toolbar below the actions toolbar which will allow you to search.

## Create a New Note

To create a new note, either click on New Note in the tree view on the left hand side, or click the New icon on the actions toolbar.

- Color - Choose a color to make this note. You may wish to assign colors based on urgency or however you wish to color code.
- Note - The actual body of the note.
- Categories - You may assign one or more categories to each note to make for easier searching.
- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.