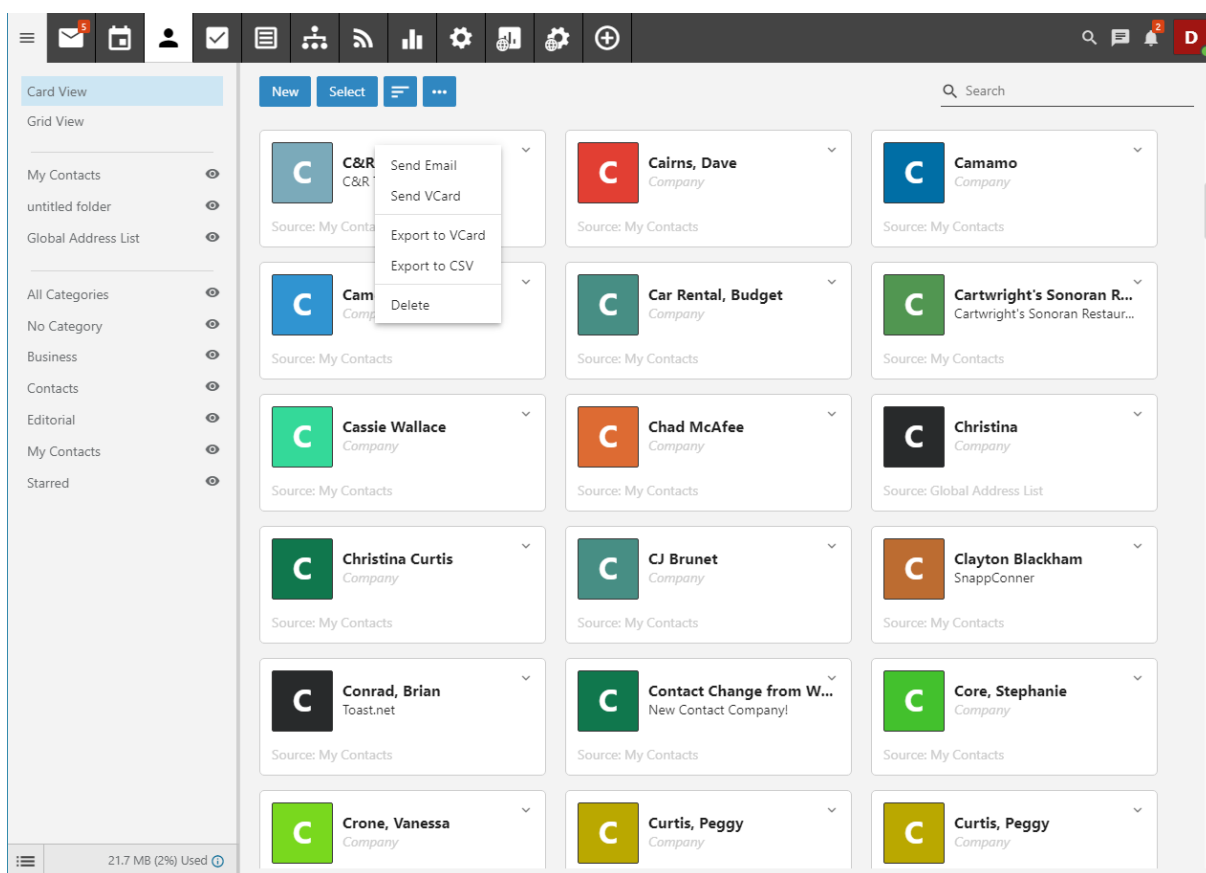# Contacts

Help Documentation

Contacts

Contacts Overview

SmarterMail features 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 internet access, anywhere in the world, using the webmail interface.

To access your contacts, click the Contacts icon. To view or hide different contact lists, such as the Global Address List, shared lists, or mapped resources, simply click the eye icon to the right of the resource name.

Navigating Your Contacts

When you view your SmarterMail contacts for the first time, chances are they'll be empty: you won't have any contacts to display. This may not be true if you've migrated to SmarterMail from another email platform or service. Regardless, the layout of SmarterMail contacts is the same whether you have migrated contacts or not.

3 Bar Icon

At the top of the folders view you'll see the 3 Bar icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

Contact Views

In general, the Contacts page is divided into two sections:

• The Contacts view displays all of your contact lists. This includes "Contacts", which are contacts you add or migrate over to SmarterMail, and any shared contact lists, such as a Global Address List (GAL).

• Individual cards that represent every contact you have displayed.

Contacts View

In general, the following options are available when viewing all contacts:

• Select - Allows you to select more than 1 contact at a time. To select multiple contacts, click Select and then click on one or more cards. To exit Select mode, click the Select button again. To de-select a contact, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:

• Select All - Selects all contacts in the list you are viewing.

• Deselect All - Deselects the selected contact(s).

• Send Email - Addresses an email message to the selected contact(s).

• Send vCards - Allows you to send an email with the the selected contact(s) electronic business card(s) (vCards) attached.

• Export to vCard - Exports only the selected contact(s) in vCard format.

• Export to CSV - Exports only the selected contact(s) in CSV format.

• Delete - Deletes the selected contact(s).

• Sort - Sorts contacts by display name, email, or company in ascending or descending order.

• Actions:

• Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes contact information. Note: This feature is only available in SmarterMail Enterprise.

• Import - Allows you to import contacts from another email system into your contact database. SmarterMail can bulk import contacts in either vCard or CSV format.

• Export all to vCard - Exports all of your contacts in vCard format.

• Export all to CSV - Exports all of your contacts in CSV format.

Individual Contacts

In addition to working with all of your contacts, each individual contact has some actions that are available. To view these, simply click the down arrow, or caret, on each card. When you do, these actions are available:

- • Send Email - Addresses an email message to the selected contact(s).
- • Send vCard - Allows you to send an email with the the selected contact(s) electronic business card(s) (vCard) attached.
- • Export to vCard - Exports only the selected contact(s) in vCard format.
- • Export to CSV - Exports only the selected contact(s) in CSV format.
- • Delete - Deletes the contact.

Contacts as Trusted Senders

By default, SmarterMail "sees" any contacts you add as "Trusted Senders." What that means is that any email you send to, or receive from, a contact bypasses any spam filters that are set up for your domain. While SmarterMail doesn't add your contacts to the "Trusted Senders" list you will find in your Spam Settings , they're handled the same way. However, unlike the email addresses or domains you add to your Trusted Senders list, messages sent to or received from contacts are not counted in any reports that list or detail messages to or from Trusted Senders. Therefore, while a contact is treated like a Trusted Sender, it's not counted as one in reports.

Sending vCards

SmarterMail users can send single vCards or multiple, as needed. Below are instructions on sending a single vCard as well as multiple different vCards.

To send a single vCard:

- • Go to the Contacts area.
- • Find the specific contact in your list, either by scrolling through your contacts or using the Search bar.
- • Select the contact, then click the Actions menu. (The down arrow, or "caret" in the top right corner.)
- • From the dropdown menu, select Send vCard .
- • SmarterMail will open a new message window with the vCard(s) attached.
- • Type the recipient's email address in the To field and compose a message. Then click Send .

To send multiple vCards:

- Go to the Contacts area.
- Click the Select button. This allows you to select multiple different contacts by simply clicking on them.
- Once you've selected the desired contacts, click on the Select button again...which is now the Selected (x) button. (Where x is the number of contacts you've selected from your list.)
- From the dropdown menu, select Send vCards .
- SmarterMail will open a new message window with the vCards attached.
- Type the recipient's email address in the To field and compose a message. Then click Send .

When sending a vCard, it can be useful to use the Category selectors to help narrow down your contacts. Using Categories as well as the Select button even allows you to send vCards for all contacts in one or more categories.

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 manually typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, simply view the desired message. SmarterMail includes "touch and go" functionality that highlights all email addresses in the header of the message. By clicking on a highlighted address, a small window opens with a few options:

- Email - Opens a pop out window so you can send a new message to this address.
- Add Contact - Opens a pop out that allows you to create a new Contact based of this email address.
- Invite to Event - Opens a pop out that allows you to create a new Appointment, with this person added as an Attendee automatically.
- Trust Sender - Adds the address to your Trusted Senders list, meaning any future emails from this address will bypass most antispam options enbaled for the server. (NOTE: SPF and DKIM still run against any address in the Trusted Senders list to prevent phishing.)
- Block Sender - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted.
- Create Filter - This options opens the Content Filtering area. Here, you can use information contained within the email message, such as the From Address, Subject, etc. and create a new Content Filter based off that information.
- Add Sender to Filter - This option opens a modal window that lists all of your existing Content

Filters. You simply select the filter you want this sender added to, and they're immediately added.

To add a contact by typing the name and other information directly in SmarterMail, open up your Contacts and click the New button. 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 many or as few details about the person as you like. In general, contact details are separated using various cards. These include:

• Personal Info - These are the "personal" details of your contact, including their display name, title (Mr., Mrs., etc.), first name, middle name, last name, their personal website (or "home page"), and birthday. You can also add a photo, avatar or icon for your contact by simply clicking on the grey circle next to the contact's Display Name. This picture is available within the webmail interface and for anyone using CardDAV or the EAS add-on to sync their contacts with email clients and/or mobile devices. Unfortunately, pictures will not sync for customers using Add to Outlook for synchronization. Note: The Display Name is the only required field to save a contact.

• Phone Numbers - You can add one or more phone numbers associated with your contact, like their home phone, mobile number, etc.

• Email Addresses - Just as with phone numbers, you can add one or more email addresses for your contact. If a contact has more than one email address, you can select which address to send to when typing the contact's name in the TO: field for a new message.

• Home Address - The contact's home address.

• Work Info - The contact's place of work, including their work Title (CEO, Marketing Director, etc.), should they have one, their company's website address, etc.

• Work Address - The street address, city, state and zip for the contact's place of business.

• Categories - Categories are a great way to organize your contacts. Using categories, you can organize business, personal or any other type of contact into tidy circles, keeping people separated based on whatever criteria you want. Contacts can be in multiple categories or none: It's up to you. Note: Categories are only a way to organize contacts. They are NOT ways to send emails to a group of individuals. For that you would want to create an Alias or use SmarterMail's Mailing List feature.

• Other - Additional pieces of information about the contact such as their nickname, their spouse's name, their asisstant's name, etc.

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 your contact list. It's best if you have all views available, such as Contacts, Global Address List, etc. so that each view is searched. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the contacts list you are viewing for matches and display the results in the navigation pane. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

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/Exporting Contacts

To initiate the importing or exporting of contacts, click the Actions button at the top of your list of contacts. From the dropdown, you'll see the following:

> • Add to Outlook - This is used for connecting your contact list to an installation of Microsoft Outlook. For more information, see Outlook Integration .
> • Import - Allows you to import your contacts from an external email client, a separate email service like Gmail, or from another SmarterMail account.
> • Export All VCARD - Exports all of your contacts in the standard vCard format for importing into an email client, separate service or to another SmarterMail account.
> • Export All CSV - Exports all of your contacts in a "comma separated values" format for importing into an email client, separate service or to another SmarterMail account. CSV files can also be opened using virtually any spreadsheet program such as Microsoft Excel.

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 file formats. Regardless of the file type imported, each contact MUST have a Display Name in order for SmarterMail to accept the importing of the contact. Other information can be added at a later date.

Follow these steps to import contacts:

- Log in to your SmarterMail account.
- Click on the Contacts icon.
- Click the Actions (...) button.
- From the drop down menu, select Import .
- The Import Contacts modal will load. Here, you can select which Contacts folder to import your new contacts to, such as the default Contacts folder or any new folders you've created.
- Next, you can either drag-and-drop a CSV or VCF file into the "add files" area, or you can click on the "add files" box to open a desktop window so you can select the file you want to import.
- Once the you've added the file(s), click the Import button.
- If any conflicts occur, you will be asked to resolve them by performing one of the actions below:

- Add Contact - This option adds a completely new contact record with the information in the vCard.
- Replace - This option replaces the contact in the box with the new one being uploaded. To examine the properties of the close match contacts, however your mouse over the magnifying glass icon in the list at the bottom of the page.
- Skip - This option skips this contact and omits the uploaded contact information.
- Once all conflicts are resolved, the process is complete.

Exporting Contacts from SmarterMail

Contacts can be exported individually in vCard or CSV format. These files can then be imported into Microsoft Outlook or other email clients that accpet these file types, or into another SmarterMail account.

To export a single contact to a CSV file in Card View:

- First, log in to your SmarterMail account.
- Next, find the specific contact in your list, either by scrolling through your contacts or using the Search bar.
- Once you find it, in the top right corner of the contact's card you'll see a down arrow or "caret". Click on that.
- From the dropdown menu, select Export to CSV .
- A standard Save window will appear that allows you to rename the file, choose where you want the file saved, etc.

To export multiple contacts (assuming you're already logged in to your SmarterTools account):

- Click the Contacts icon.
- Click the Select button. This allows you to select multiple different contacts by simply clicking on them.
- Once you've selected the desired contacts, click on the Select button again...which is now the Selected (x) button. (Where x is the number of contacts you've selected from your list.)
- From the dropdown menu, select Export to CSV .
- Again, a standard Save window will appear that allows you to rename the file, choose where you want the file saved, etc.

To export ALL contacts to CSV:

- Click the Contacts icon.
- Click the Select button, then click on it again as it's now the Selected (0) button.
- From the dropdown menu, choose Select All .
- Now, the Select button is the Selected (x) button, where (x) is the total number of contacts that were selected. Click on it again.
- From the dropdown menu, select Export to CSV .
- Again, a standard Save window will appear that allows you to rename the file, choose where you want the file saved, etc.

Global Address List

The Global Address List, sometimes referred to as the "GAL," is most commonly identified with Microsoft Exchange. The GAL is essentially a directory service within SmarterMail that contains a dynamic list of all contact information for every user on your domain. While individual mailboxes are contained within the GAL, Domain Administrators can further manage what's included in the GAL in order to hide users that may not represent real people, such as any aliases and/or mailing lists.

Contact information for the Global Address List is pulled from the individual account profiles of users. To update your listing, go to your settings area . Under User Settings, go to your Account Profile and edit your information.

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.

Other than the availability of the information within the Global Address List, it functions almost identically as Contacts. The difference is that anything in My Contacts is seen only by you.