



## MARK5 | *Basic guide*

## 0.0 | *Welcome*

In this brief guide we will cover the basics of MARK5 such as starting up, understanding the MARK5 interface basics and sending a message. If you require more detailed information, we advise to use our detailed user guide, that has more specialised knowledge on MARK5.

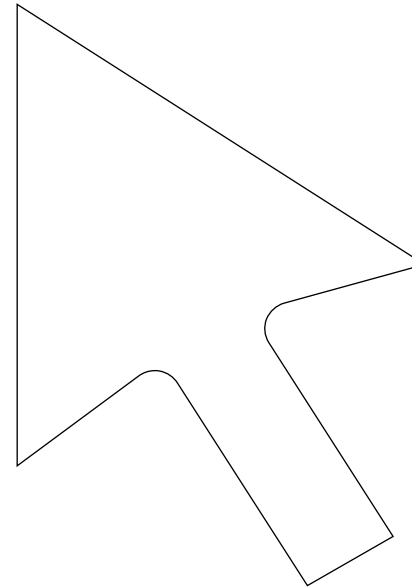
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## 1.0 | *Basic navigation*

The following chapter will teach you about the basic navigation and the workarea in MARK5. You will also find a guide to the keyboard shortcuts in MARK5



# 1.1 | Short-keys

Combine with nothing

Combine with Alt

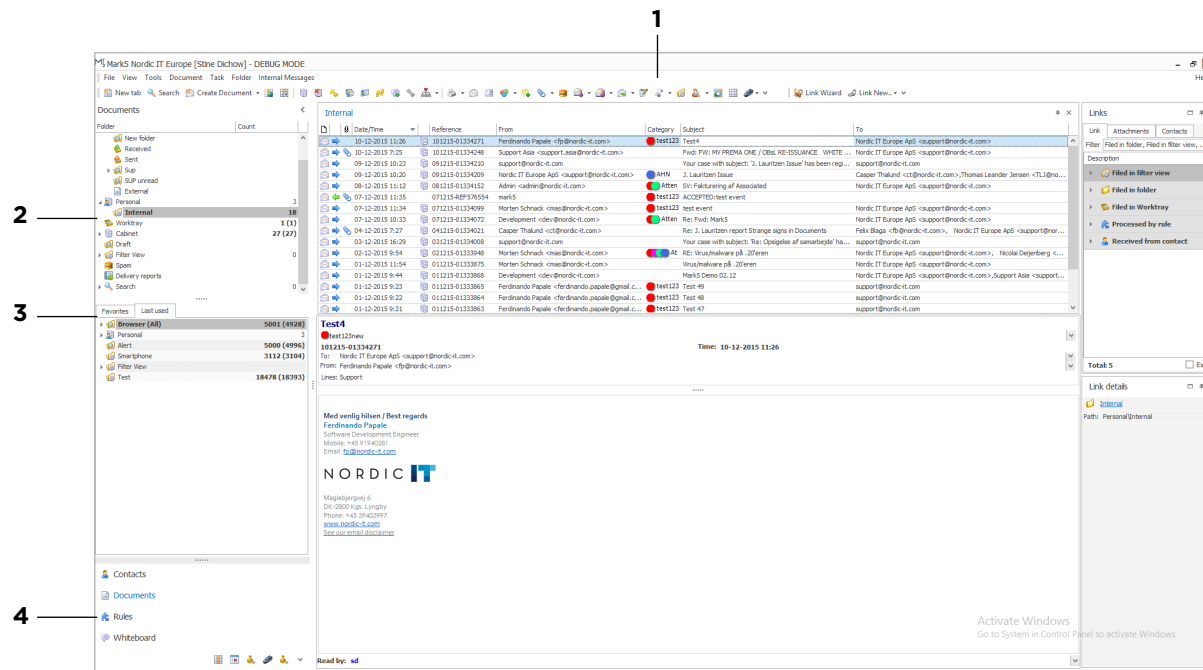
EDITOR SHORT KEYS: Combine with Ctrl

Combine with Ctrl

Combine with Ctrl + Shift

Esc	F1	F2 ADD EXTERNAL DOCUMENT CREATE NEW EMAIL	F3 SCROLL BETWEEN EMAILS	F4 SCROLL BETWEEN EMAILS	F5 EDIT/SEND DOCUMENT	F6 REPLY ALL REPLY EMAIL	F7 FORWARD EMAIL	F8 SEARCH	F9 SHOW ACTIONS	F10	F11	F12	Print Screen	Scroll Lock	Pause Break	
.	1 ASSIGN TO CATEGORY	2 ASSIGN TO CATEGORY	3 ASSIGN TO CATEGORY	4 ASSIGN TO CATEGORY	5 ASSIGN TO CATEGORY	6 ASSIGN TO CATEGORY	7 ASSIGN TO CATEGORY	8 ASSIGN TO CATEGORY	9 ASSIGN TO CATEGORY	0 QUICK EDIT FILTER	-	=	\	Insert	Home VIEW LATEST RECEIVED DOCUMENT	Page Up JUMP BETWEEN DOCUMENTS
Tab ↔	Q FILE TO FOLDER	W COPY TO PERSONAL WORKTRAY	E CENTER	R ACCESS RIGHTS ALIGN LEFT	T EDIT TEMPLATE INSERT TEMPLATE	Y COPY TO USER WORKTRAY	U UNDERLINE	I INTERNAL MESSAGE ITALIC	O ADD COMMENT OPEN FILE	P PRINT	{	}	Enter ↵ SEND EMAIL	Delete	End VIEW FIRST RECEIVED DOCUMENT	Page Down JUMP BETWEEN DOCUMENTS
Caps Lock	A SELECT ALL	S SEARCH FOR FOLDER DOCUMENT TRANSMIT STATUS SAVE	D	F FIND WORD	G	H REPLACE	J	K	L ALIGN LEFT	:	"					
Shift	Z UNDO	X CUT	C OPEN CATEGORY WINDOW COPY	V PASTE	B BOLD	N	M NEW INTERNAL MESSAGE	<	>	?	Shift	Turbo			↑ SCROLL WITHIN EMAIL MOVE FOLDER UP	
Ctrl		Alt	MARK DOCUMENT AS READ				Alt			Ctrl			←	↓ SCROLL WITHIN EMAIL MOVE FOLDER DOWN		→

## 1.2 | Work area



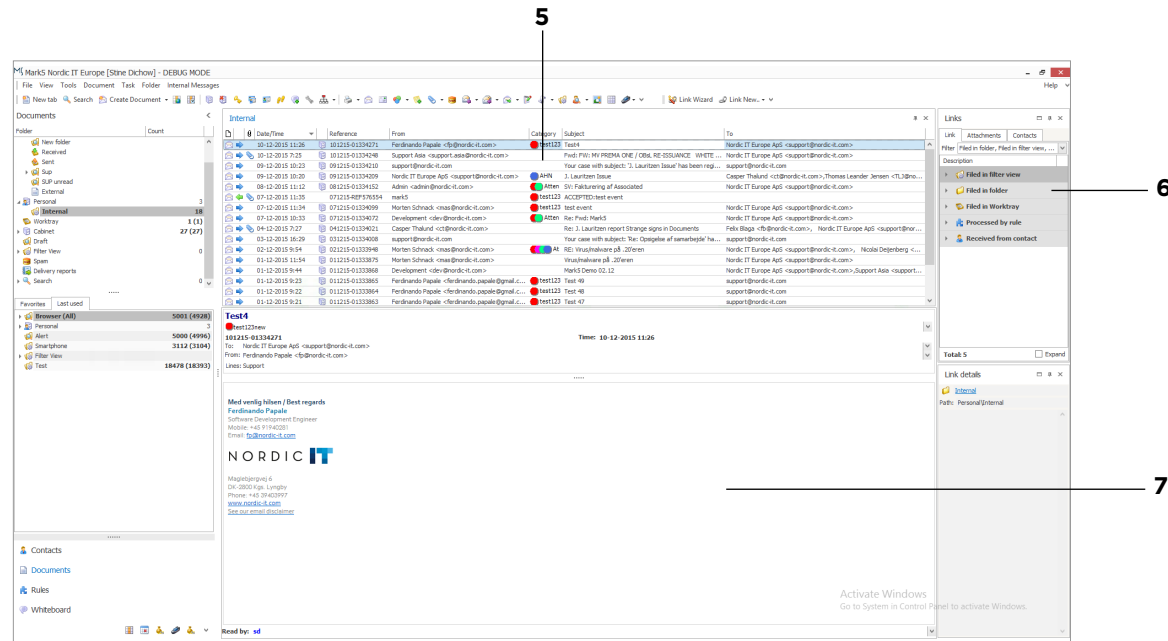
**1** | The **main menu** and **icon-bar** is where you choose specific functions in MARK5. Most functions are accessible through both the **menu**, through **icons** and by using short-keys. Scroll over the icons and you will find, a description pops up as you pass over.

**2** | **Folder** is your navigation tool between different folders. Choose which documents you want systemized or archived and create personal and shared folders for a better overview and archiving. If you click on the arrows on the left side of the folder-pane you can expand and collapse how detailed you want your overview of folders to be. You can always right-click on folders to edit.

**3** | **Favourites** is where folders added to favourites are located. Commonly used **folders** can be added to favourites for faster navigation. Right-click on the folder in question and choose **add to favourites**. In this area you can also tab to **recently used**. Here you can see folders recently used for faster access. This section is best used by adding popular folders so you can locate them quickly.

**4** | **Navigation of modules** is where you navigate in MARK5 between **Contacts** (address book), **documents** (emails, messages and documents), **Rules** (creating automatic guidelines), **shortcode** (create and edit distribution lists), **whiteboard** (shared board for text, mails and information) and **tasks** (calendar). Depending on what you choose in this section, the content on your screen will change accordingly.

## 1.2 | Work area



**5 | The Object List** views emails. Note that the object list only views the content of the folder you have chosen and will change accordingly. Use the arrows on your keyboard to navigate through emails or click directly to select the email you want to see. Emails can be **outgoing** (green arrow) or **incoming** (blue arrow). Red cross means that the mail has **not been sent or received**. To learn more of the error, enter **Ctrl+S** or go to the iconbar and press transmit status. You can personalise by maximising and minimising the windows according to your need - just drag the dividing lines.

**6 | Links** shows how the objects in MARK5 are linked together. You can link everything across modules as you please. In the bottom of the link area you have the specified link details. Click on the link in question, and the details will show.

**7 | Preview Pane** displays a preview of the chosen object from the **Object List**. The preview pane can be customized and designed as you wish.

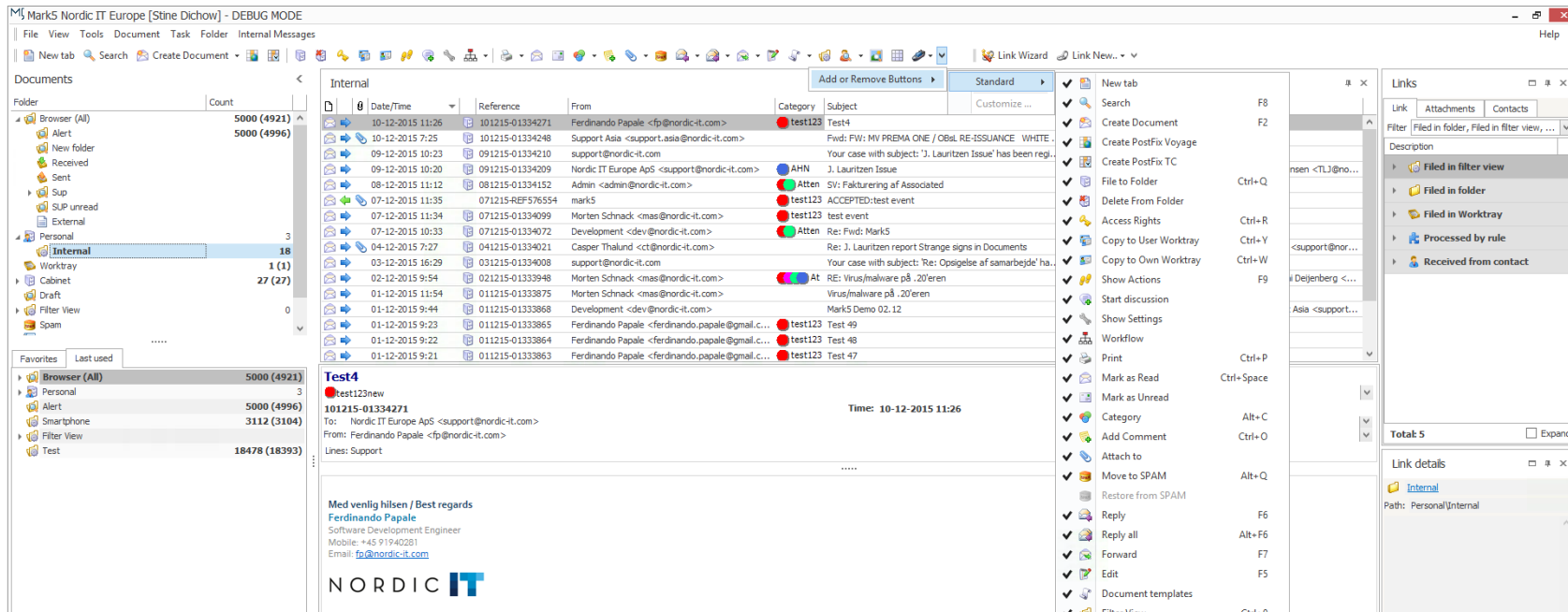
## 1.3 | Menu & icons

Now, take a look at the **menu** and **icon-bar** in MARK5. This is where you have access to the different functions in the system. You can find it at the top of the interface.





## 1.3 | Menu & Icons



You find the [menu](#) on your left and the [icons](#) on your right. You will find, that many functions can be found both places. If preferred, you can add [navigation arrows](#) to the menu. The arrows can be useful, when navigation through a large amount of emails. The icon-bar is highly customisable. You can add and remove icons according to your need. In the picture above, you see where to customize to suit your personal needs.

Here is what you do: Click on the [arrow](#) in the [toolbar](#). Then click [Add or Remove Buttons](#) and choose [Standard](#). Now you can add or remove icons to and from the [toolbar](#).

As you move across the [icons](#), text appears with a description of the icon in question. By right-clicking on most objects, a [context menu](#) of available functions will appear.

The menu is sensitive to changes between modules, and some icons will change as you navigate between modules in MARK5.

## 1.4 | *Customize work area*

Most [dividers](#) between areas can be dragged by clicking, holding down and dragging the divider.

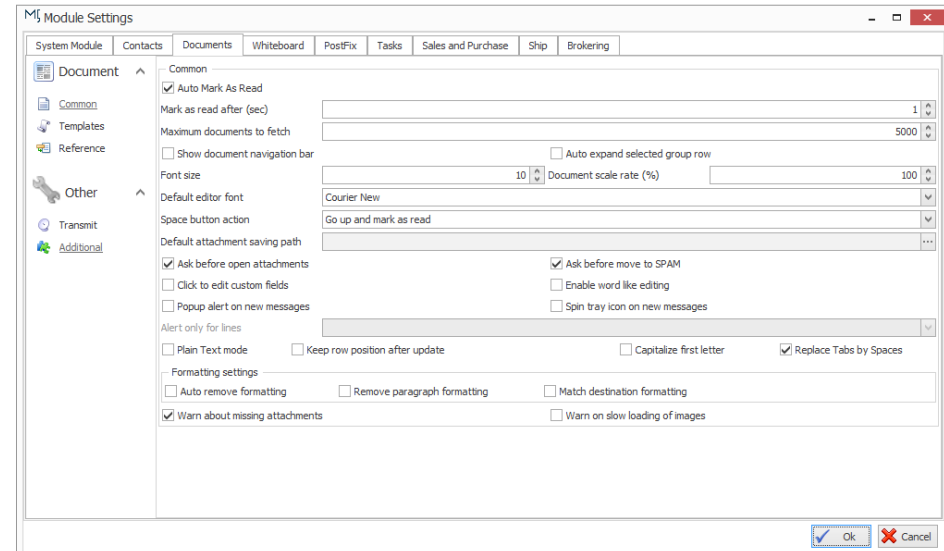
By using this method, you can resize the entire [work area](#) to suit your needs.

You can also drag most [panels](#) around the screen and reorganise by click-and-drag in the surrounding box of the panel. If you want a panel hidden, you can also cross them off in the upper right corner.

To customize your [settings](#) in MARK5 you need to use the [settings icon](#). This can be found in the [icon-bar](#) and appears as a tool.

Try to modify your [documents view](#). You need to go to [settings](#) in the [toolbar](#). This will open a new window as shown in the screenshot. As you can see in the picture, you can modify your [document view](#) by changing [font](#) and [font size](#). You can also alter the document size by altering [document scale rate](#).

**NOTE** | Pay attention to whether or not [Popup alert about new messages](#) is crossed off. It is not recommended to get alerts about new messages, due to the fact that you will be alerted everytime the system receives a message. If you want [alerts on some messages](#) you can choose [alerts from specific lines](#) instead. Modify via [alert only for lines](#).



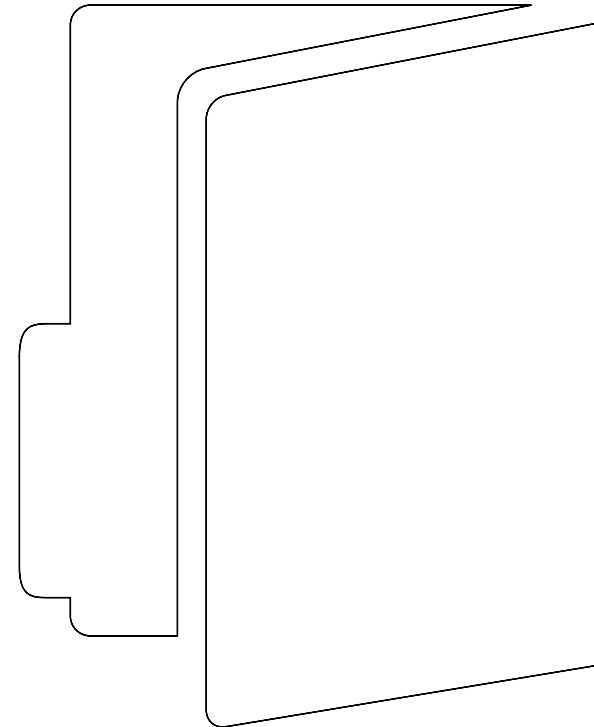
**EXERCISE** | Using what we just learned, add and remove icons from and to the menu. Customize your work area by expanding, collapsing and dragging.

## 2.0 | *Folders*

MARK5 has different options for **archiving** and **structuring** your **workspace**. In the following chapter we will go through each of them as well as explaining how to choose the optimal **folder** in a case-specific situation.

**NOTE** | You can create **sub-folders** to folders as you please.

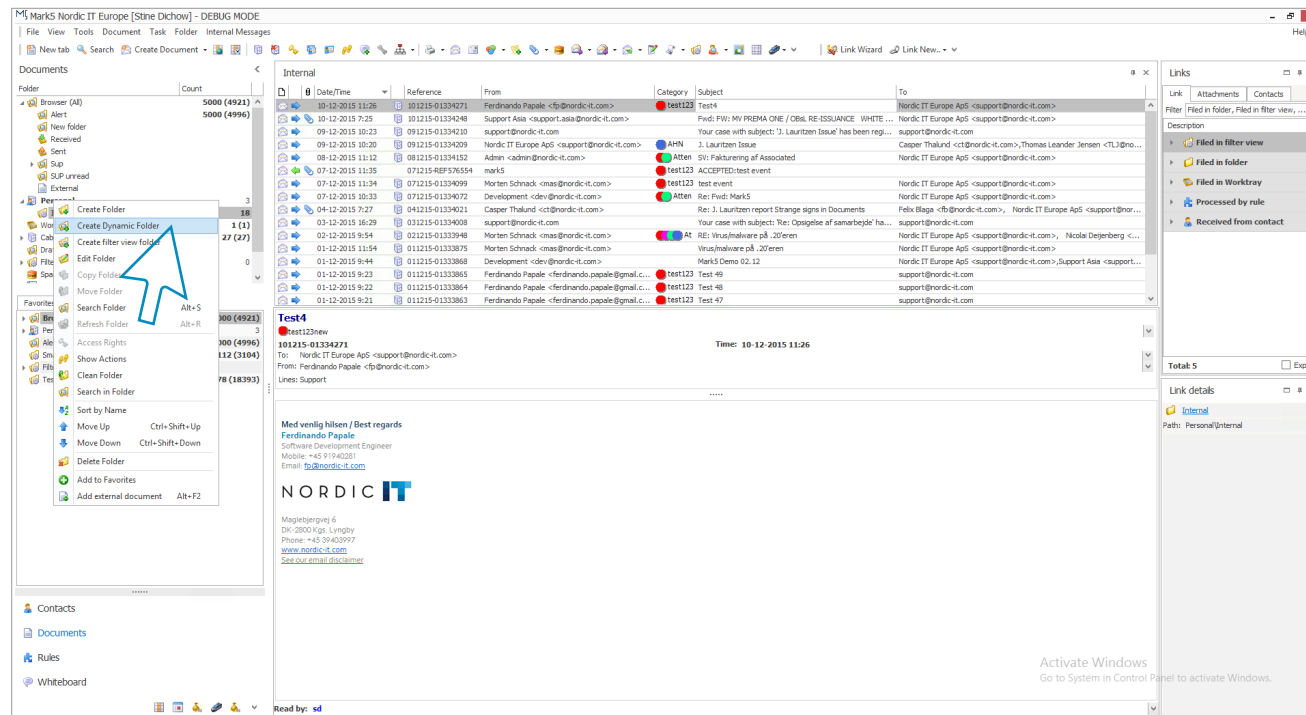
Be aware of what is **public** and what is **private** when handling **folders**. There are only two private folders in MARK5: **personal** and **worktray**. If you want a new folder to be private, remember to file it in your personal folder. E.g. if you archive in the **browser** or the **cabinet**, it will affect all users.



## 2.1 | Folder index

<b>C</b>	<b>CABINET FOLDERS</b> Your cabinet folders are your storage space. Here you can archive mails manually.	<b>COMPANIES FOLDERS</b> The companies folder can be found under the contacts function. This folder contains your contacts sorted by companies.
<b>D</b>	<b>DYNAMIC FOLDERS</b> The dynamic folder is a predefined search folder, which you can always access fast. A dynamic folder can be useful if you often need the same search of documents. A dynamic folder will search backwards into old messages according to how far it is set to go. Dynamic folders should be chosen, if you need the folders to search back in time.	
<b>F</b>	<b>FILTER VIEW FOLDERS</b> Filter view folders consists of content from the time of creation and forward. The filter view folder allows you to create folders to filter messages as they arrive in the system for better overview. Filter view folders are the best choice when you need emails with specific characteristics systemized.	
<b>P</b>	<b>PERSONAL FOLDERS</b> The personal folder is not a specific type of folder as the others, but everything you archive here is private.	<b>PERSONS FOLDERS</b> The persons folder can be found under the contacts function. This folder sorts and views your contacts as persons, and their first names will be listed in alphabetic order.
<b>W</b>	<b>WORKTRAY</b> The worktray is a private folder that all users have. Both yourself and other users are able to file to your worktray. With this feature, your colleges can file emails to your worktray, to make sure that you will see the messages. If you subscribe to your worktray you will get a notification each time there is incoming emails in your worktray.	

## 2.2 | Dynamic folders



The **dynamic folder** is a pre-defined **search folder** which you can always access fast. A dynamic folder can be useful if you often need the same search of documents from a **company**, **person**, **creator**, **direction** (outgoing, incoming, external and draft), **text** (eg. a word in a document: shipping, vessel etc.), **attachments**, **date range** or **communication lines**. A **dynamic folder** will **search backwards** into old messages according to how far back you define it to go. In general, every one sees dynamic folders. This can be modified via **access control options**. You can also create a **personal dynamic folder**, by creating the folder in your **personal folder**. Note that, dynamic folders are server intensive, so use them with caution.

**Dynamic folders** should be chosen, if you need the folders to **search back in time**. If you only need the folder to search from time of creation, this is not the optimal choice.

In the picture above you see how to create a **dynamic folder**, in this case we create it in the **personal folder**. To create a dynamic folder right-click on the folder you want to place the new folder into and click **Create dynamic folder**. When you choose **personal** as in this example no one, but yourself can see the folder. If you want it to be **public**, place it in the **browser**.

## 2.2 | Dynamic folders

This is the [new folder window](#). For more details on this window, see chapter 5: Search.

Now we have to type in our specifications to define the [pre-defined search](#). Name the folder.

In this example we search for the text MARK5 in the [subject](#) only - both in [incoming](#) and [outgoing documents](#), so this is what we type and select. Then, press [ok](#) and you will see your [dynamic folder](#) in the [folder pane](#).

The screenshot shows the 'New Folder' dialog box in Microsoft Outlook. The dialog is titled 'New Folder' and contains various search criteria fields. The 'Folder name' is 'New folder'. The 'Search Text Where' is set to 'Subject OR Message Same'. The 'Search String' is empty. The 'From AND To' dropdown is set to 'From', with 'From' and 'To' fields below it. The 'Reference' field is empty, and the 'Category' dropdown is set to 'None'. The 'Direction' dropdown is set to 'None', and the 'Priority' dropdown is set to 'None'. The 'Type' dropdown is set to 'None', and the 'Comm. lines' dropdown is set to 'None'. The 'Creator' dropdown is set to 'None'. The 'Unread' checkbox is unchecked. The 'Date range' is set to 'None', with 'From' and 'to' fields set to '01-01-1753'. The 'Comment' field is empty. The 'Attachment name' field is empty, and the 'Having Attachment Only' checkbox is unchecked. The 'Voy No OR t' dropdown is set to 'None'. The 'Filed in folder' dropdown is set to 'None', with 'Any' and 'None' options visible. The 'Processed' section has three radio buttons: 'Show all' (selected), 'Show handled', and 'Show not handled'. The 'Workflow' dropdown is set to 'None'. The 'Search in SPAM folder' checkbox is unchecked, 'Search in delivery reports' is unchecked, and 'Search in archives' is checked. The 'Force to use index' field is empty. The 'Constant folder' checkbox is unchecked. The 'Ok' and 'Cancel' buttons are at the bottom right.

## 2.3 | Filter view folders

Compared to [dynamic folders](#), [filter view folders](#) share some of the same characteristics, since you also define them through searches. The main difference though is that where [dynamic folders](#) can be set to go back in time, [filter view folders](#) only consists of [content from the time of creation and forward](#). The filter view folder allows you to create folders to [filter messages](#) as they arrive in the system for better overview. [Filter view folders](#) are the best choice when you need emails with specific characteristics systemized. To create a filter view folder right-click on the folder you want to be the [parent folder](#) and choose [create filter view folder](#). Your create filter view folder window will appear on the screen.

Here you have the option of adding the [criteria](#) you want (press the top add button). Also, you have the option of adding criteria you don't want (click the lower add button). Mark as [constant folder](#) if you don't want the folder to be [locked](#) (no one can move or edit except the administrator). In the bottom of the window you find [access rights](#) where you can customize, who has access to the folder. When you press the [add](#) button the [search conditions](#) window opens. Here, select whether to search for [inbound/outbound](#) or both. Type in your criteria in [search string](#). Now, hit [ok](#) on the search conditions window. Your search will now appear on screen. Click [ok](#) to create the [filter view](#).

**NOTE** | The most important difference between [dynamic](#) and [filter view](#), is that [filter view](#) does not search for messages in the past. And the folder will only keep messages for as long as the time specified in the [date setting](#).

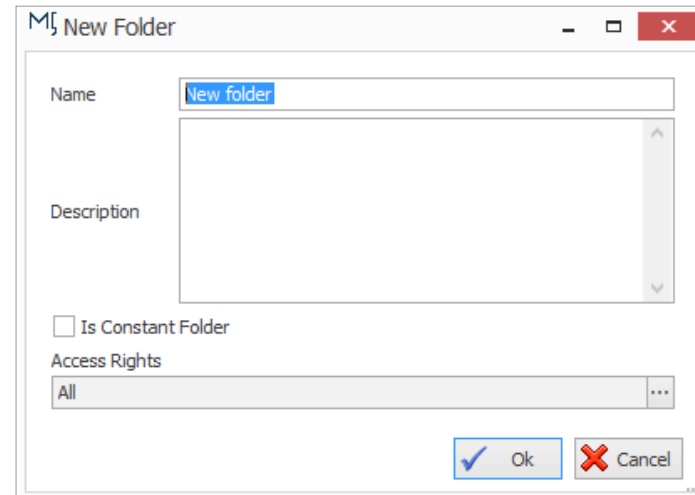
## 2.4 | Cabinet folders

Your [cabinet folders](#) are your storage space. Here you can [archive](#) emails. You can file your emails to the cabinet very easy by pressing [Ctrl+Q](#) or click the [File to Folder icon](#).

When you create a cabinet folder you have the option of setting the [access](#) to [personal](#). If you don't, everyone will be able to see your folder.

Lets try to create a folder in the [cabinet](#):  
Right-click directly on the cabinet in your [folder-view](#) and choose [Create folder](#). Your new folder window, similar to the screenshot, will show.

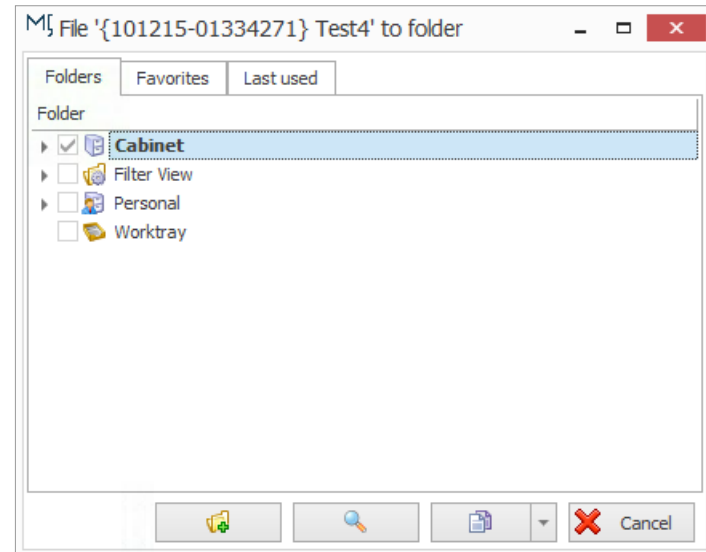
Type in folder [name](#) and [description](#). In constant folder you decide if the folder can be changed. In the bottom you find [access rights](#) where you choose whether you want the new folder to be private or not. Press [ok](#) to create.





## 2.4.1 | *File to Cabinet folder*

You can always **file** an email to any folder by right-clicking on the email. Then choose **file to folder**. You can also just press **Ctrl+Q**. Your filing window is shown in the screenshot. Just choose the cabinet and press ok.



## 2.5 | *Personal folder*

The [personal folder](#) is not a specific type of folder as the ones above, but everything you archive here is [private](#) so this is where you store private information. You can create either [dynamic folders](#) or [filter view folders](#) in your [personal folder](#) as you wish. Right-click on the folder and follow the same procedure as creating a [cabinet folder](#).

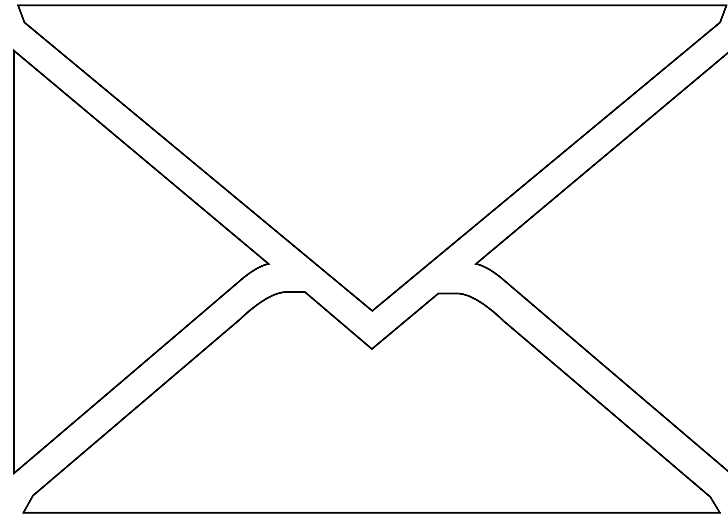
## 2.6 | *Favourites*

You find the [favorites tab](#) at the center of your [left panel](#). You can add folders to favorites that you use often for easy access. Just right-click on the folder and choose [add to favorites](#). To remove from folder, right-click and delete.

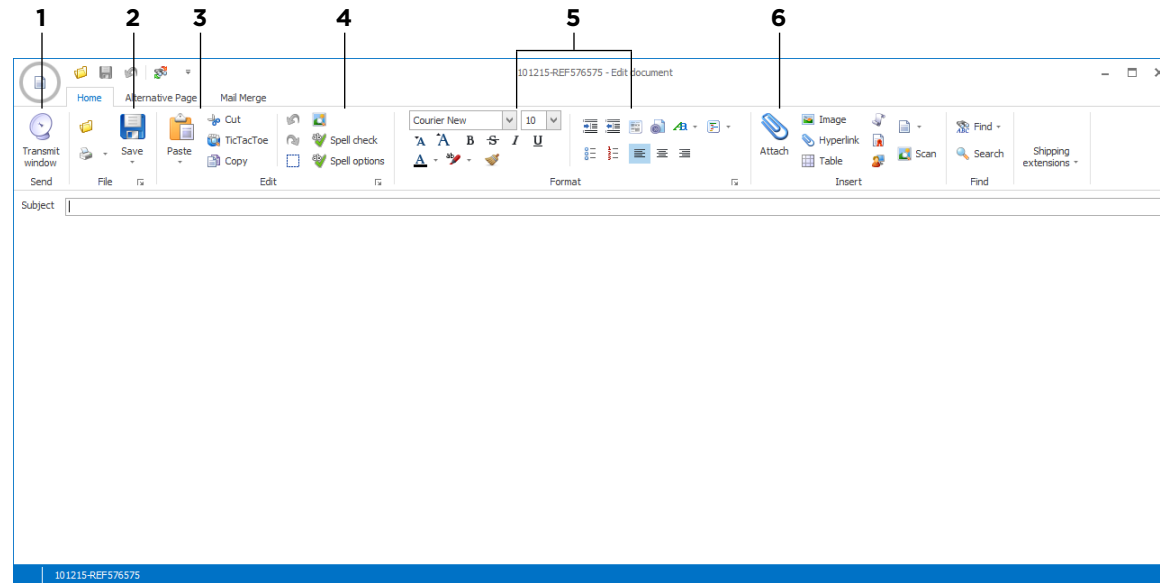
**EXERCISE** | Create a dynamic folder.  
Create a filter view folder.  
Create a personal folder.  
Add important folders to favorites.

### 3.0 | *Email operations*

In the following chapter you learn how to send **emails** with various details. We will go through simple **mail composing**, **attachments** as well as **assigning messages** to other objects in MARK5.



### 3.1 | Compose email



First, we will dig into [creating an email](#). To create a new mail in MARK5 you have three options: Press **F2**, click the [Create document icon](#) in the [toolbar](#), or choose [document](#) in the menu and then choose: [create document](#). Either way a new window, similar to the screenshot above, will appear.

In the picture, you see your [workspace](#) when composing and designing mails. In the upper part of the window, we have our [options](#). Below you find the [writing panel](#). Here your [editing options](#) are divided into different sections as shown in the image above.

**1** | This is where you click to [send](#) the document.

**2** | Here you can [save](#) your message into your [draft](#) section.

**3** | This is where you [insert](#) and [edit in and out from other programs](#).

**4** | This is your [spell check](#) option. MARK5 provides Danish, English UK, English US, German, Norwegian and Russian spell check.

**5** | The 2 next sections provide you with your standard [editing](#) and [layout options](#).

**6** | This is your [attachment](#) option. The [paperclip](#) allows you to attach any kind of standard attachment, whereas the rest of the icons allow you to attach more specified files. You can also use drag and drop as you know it from Outlook to drag files to MARK5. The same applies with Tramos: You can drag and drop to and from MARK5 and Tramos as you wish.

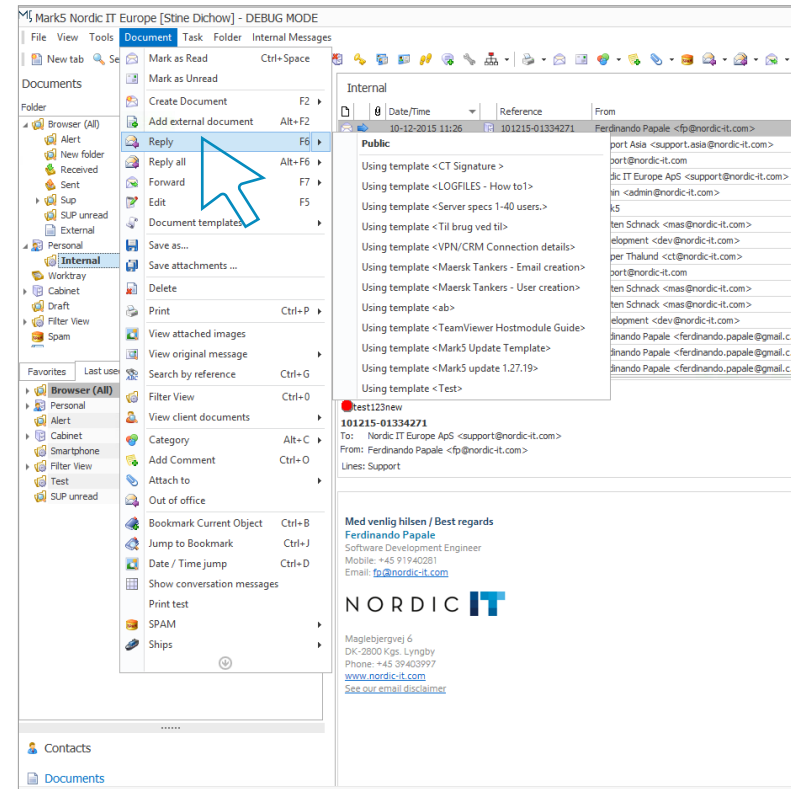
When your message is done press [send](#).

## 3.2 | Reply

To **reply** choose the email you want to respond to and press **F6** or do as follows:

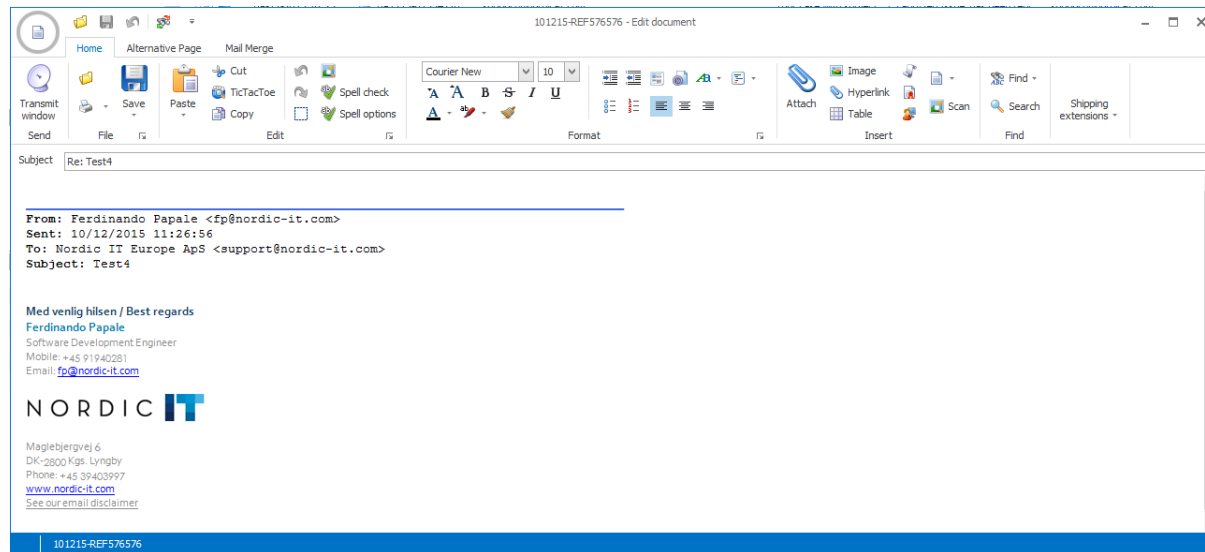
The screenshot shows how to **reply via the menu**: click on **documents**, then **reply**. When choosing reply, a window will show with **templates**.

Choose the one you want.

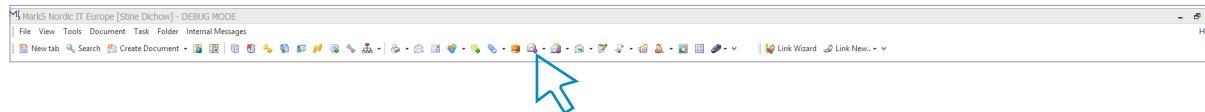


## 3.2 | Reply

1.



2.

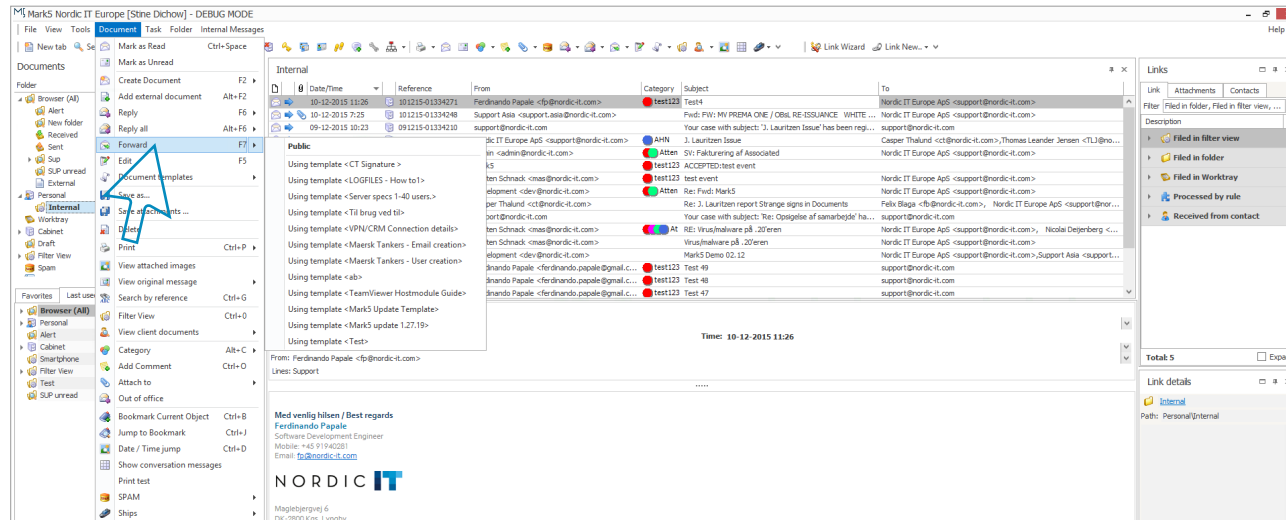


1 | Now your document panel will show, as in screenshot 1. Proceed as normal, when [creating an email](#).

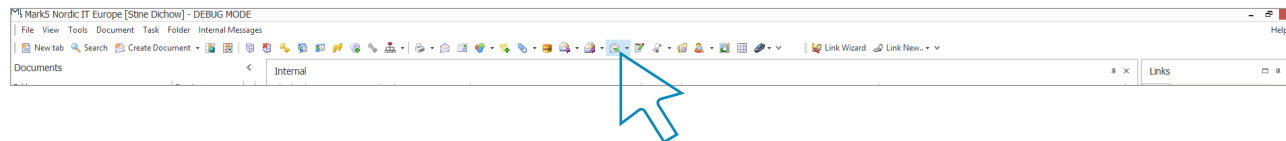
2 | You can also use the [tool-bar to reply](#). Click on the [icon](#) as shown in screenshot 2 and proceed the same way as just described.

## 3.3 | Forward

1.



2.



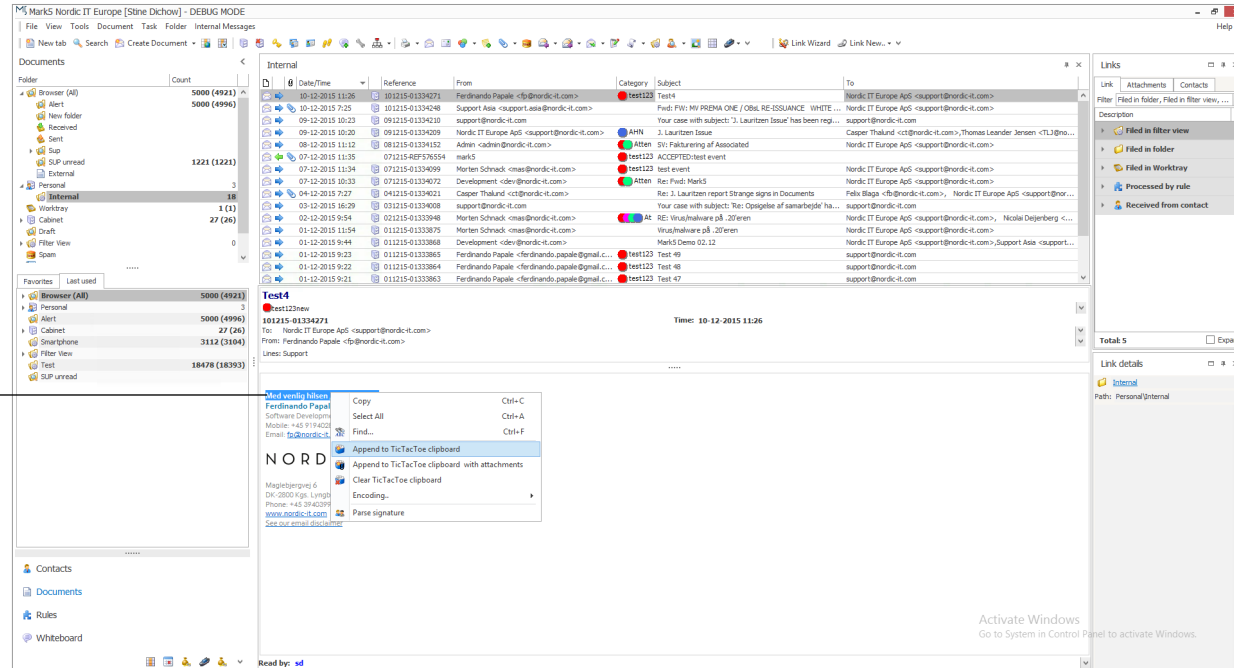
To **forward** follow the same procedure as when **replying**: Choose the email you want to forward, then either press **F7** or as follows:

**1** | Choose **document** at the menu and choose **forward** and decide on a **template**. This will open the **documents panel**, where you must proceed as done when creating a document.

Again you can also use the **toolbar** to forward:  
**2** | Click on the **icon** as done in screenshot 2, and follow the same procedure as just described.

## 3.4 | Tic-tac-toe (Clipboard)

Highlight the text  
and right-click



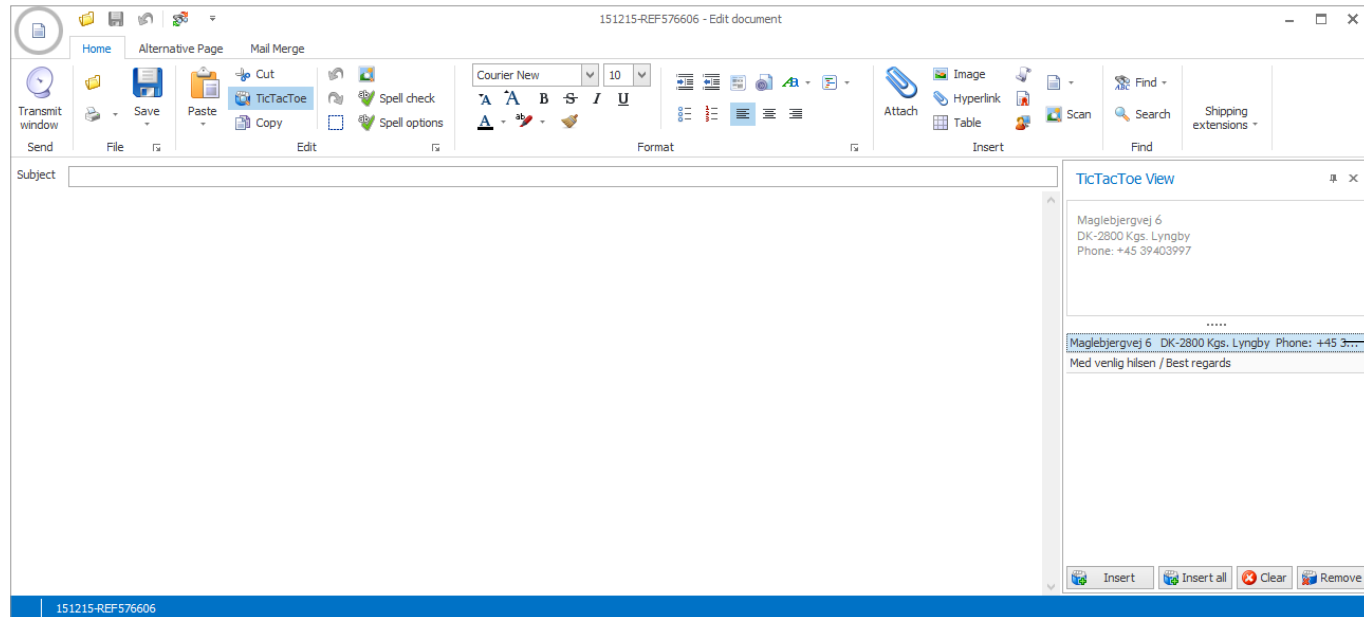
The **tic-tac-toe clipboard** is an extension of cut and paste. It allows you to **save multiple cuts** and then choose what to paste when editing a **document** or **contact**. This can be useful when you need to cut more than one section from different documents into one message.

To use **tic-tac-toe** start by **highlighting** whatever you need to copy. This is illustrated in the screenshot above.

When your text is highlighted press the **insert** button on your keyboard. This will add the text to your **tic-tac-toe clipboard**. You can also add the text by right-clicking on the highlighted text. You can add as many cuts as you need to the clipboard.



### 3.4 | Tic-tac-toe (Clipboard)



When you have finished cutting, [create document](#) and click on the [tic-tac-toe button](#) (blue highlight) in your [document workspace](#).

As the picture illustrates, you have your [clipboard](#) in the right column.

In this example we have saved 2 text-phases that shows in the lower right column. The upper section of your clipboard will show a [preview of the marked clip](#). You navigate between clips in the box below. Double-click on the clips to clip them into the document as you wish and edit as if you were editing a regular document.

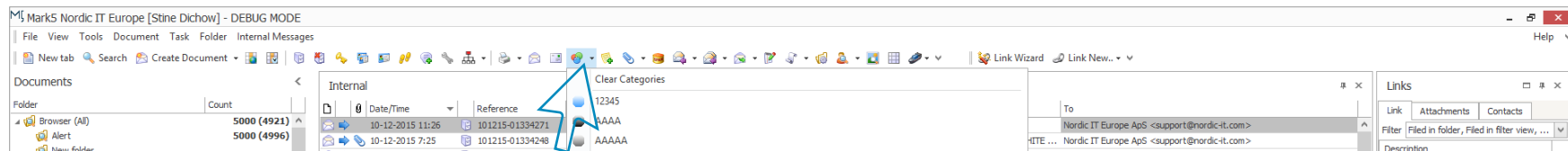
Your clips will only remain in your [clipboard](#) till you delete them or restart MARK5.

## 3.5 | Assign messages

In MARK5 you can mark messages by [text](#) or by [categorising](#). This can be useful if specific departments or if employees need to pay attention to specific messages.

There are multiple functions in MARK5 that can be helpful in this matter, so in this section we will go through useful functions including: how to [categorise messages](#), how to [add comments](#) and how to [assign tasks to messages](#).

### 3.5.1 | Categorising



Lets start looking into how you [categorise a message](#). When categorising messages the mail in question will be highlighted with a certain colour according to the specific category. This can e.g. be useful if you want [high attention mail](#) to go into an isolated folder for easy access.

To add a certain category to a document, make sure you highlight the message you want to categorise before you start. To open categories you can always press: **Alt+C**. You can also find the [categories](#) in the [icon-bar](#) and under [document](#) in the [menu-bar](#).

Choose the category you want, and the document in question is categorised.

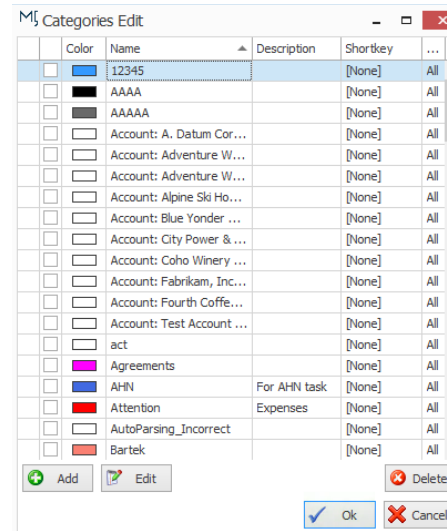
### 3.5.2 | *Create new category*

If you cannot find a category suitable for your needs, you can **create a new** one: Click directly on the **icon** and a new window appears.

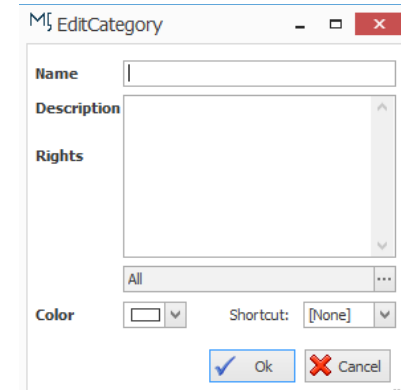
**1** | In the picture you see the **add button** in the bottom left corner. Click here, and you will be able to **customize a category** of our own.

**2** | In this screenshot you see the **new category window**. Enter your specifications and click ok. Your new category will now be available for use in the **category menu**.

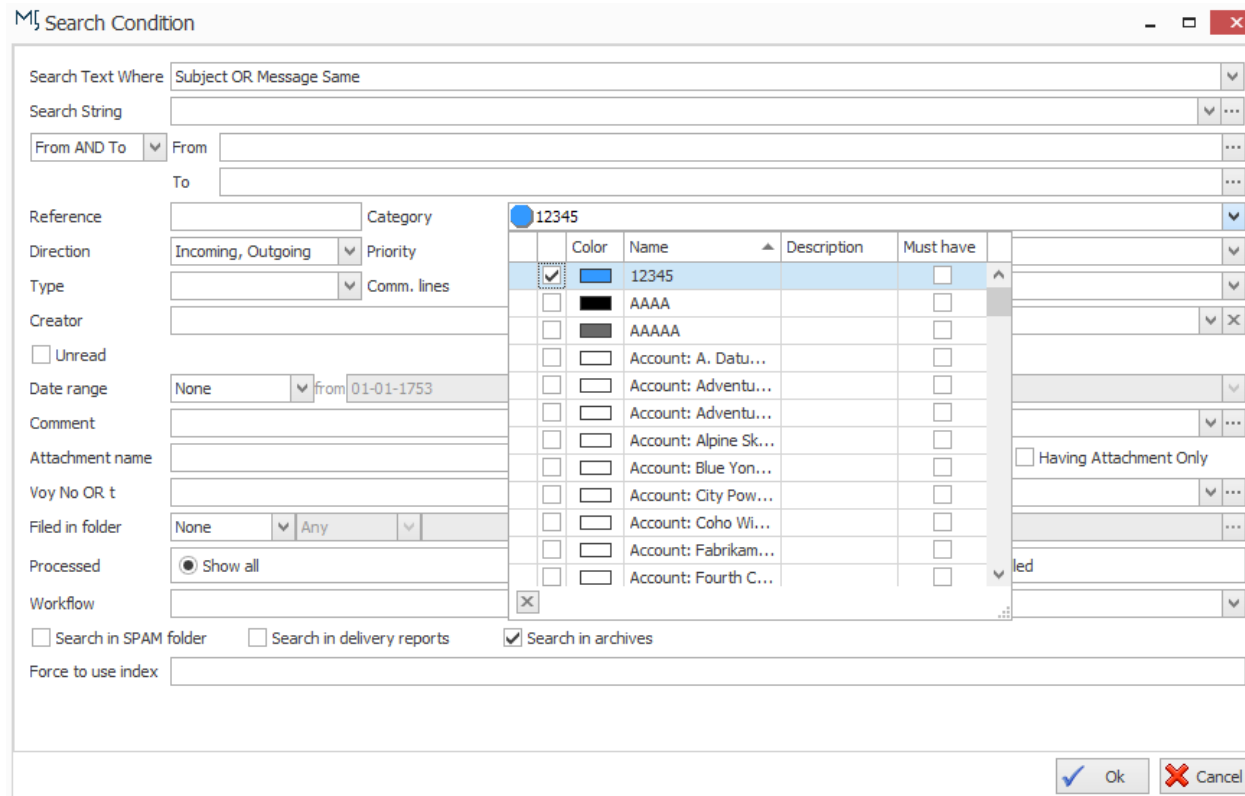
**1.**



**2.**



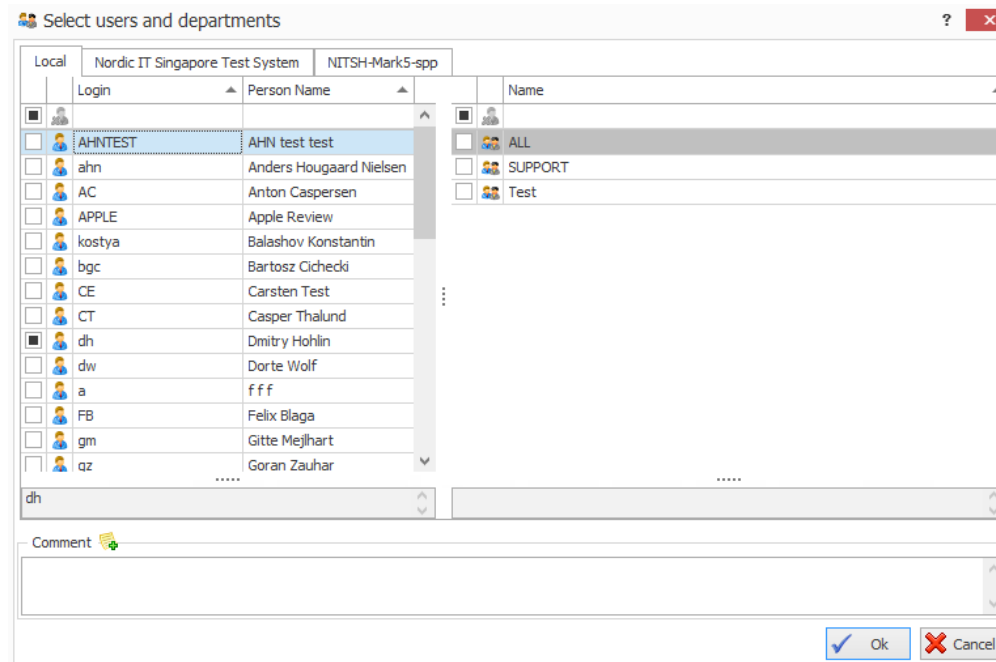
### 3.5.3 | Add a certain category to a folder



If you want a certain [category](#) to go directly into one [folder](#), you just create a [filter view folder](#) as described in the folder chapter. When creating the folder, you can set it to gather all [documents](#) from a [category](#).

In the picture above you can see how you set a folder to catch everything from a certain category.

### 3.5.4 | Add document to work-tray



You can also [assign](#) in MARK5 simply by adding documents to employees [work-tray](#). This will create the foundation of easy access to incoming mails of relevance to a specific user.

To [assign documents to work-tray](#) you can choose to either assign to your own (Ctrl+W) or to another user (Ctrl+Y). You can use the short-keys, right-click on the [message](#) or choose [documents](#) in the [menu](#) and [add to work-tray](#).

This will open a new window, as the one shown above, where you can choose users as you wish.

You can add the document to as many worktrays as you like, by either clicking on every [user individually](#) or by adding to a [predefined group](#). Click ok and the document can now be accessed through the [worktray](#) in question.

### 3.5.5 | *Add comment to document*

You can also use simple text in documents to [add a comment](#). This can be helpful if many employees are handling the same documents.

The comments field can make sure that employees across departments are notified on what is going on constantly.

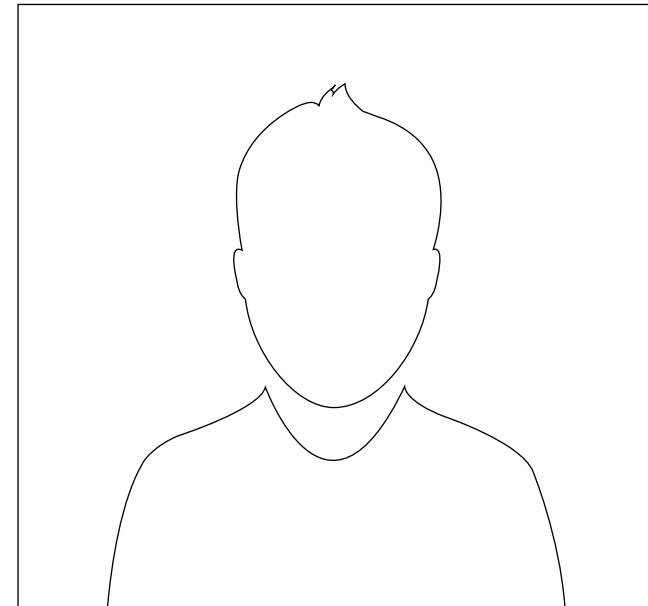
You can access the [comments field](#) by pressing **Ctrl+O**.

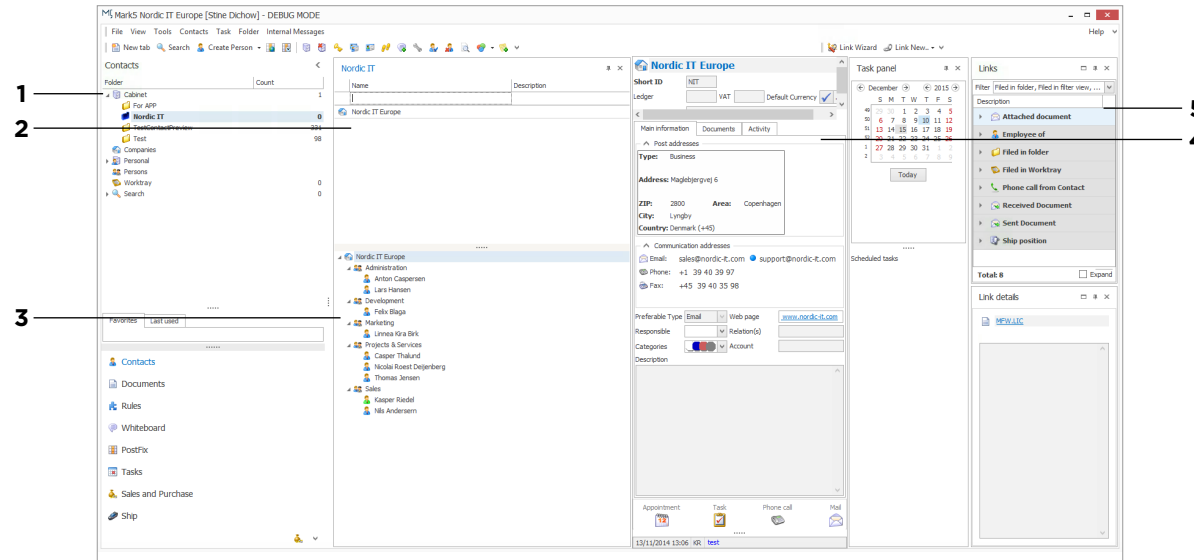
**NOTE** | You can use the [text column](#) in the top of the [preview pane](#) to [add notes](#). E.g. type in your initials to notice others that you are working on an email.

**EXERCISE** | Compose a test mail using Tic-Tac-Toe. Attach a file to the mail. Send the mail using both to, cc and bcc. Add a comment to a mail. Assign a mail to your own and another worktray.

## 4.0 | *Contacts module*

In the following chapter you will get familiar with the **contacts module** and learn to add **persons** and **companies** to your contacts. You can also add departments, just follow the same procedure. The **contacts module** is your address book.



4.0 | *Contacts module*

When you click on [contacts](#) in the lower left corner you will notice that your screen changes, as does your [menu](#). In the picture above you see the [work-area](#). You can use the dividing lines to maximise and minimise or simply remove sections by crossing them off. Set up the screen to suit your need. Lets quickly go through the [contact window](#).

**1** | On your left hand you have your [Folder view](#). Here you choose whether to view [companies](#) or [persons](#). Depending on what you choose, the content just right of the folder changes.

**2** | This area shows the [content](#) of the particular [folder](#) you have chosen. In the top, you see an empty column. Here, you can [search](#) in the [contacts](#). Just start typing.

**3** | Here you have a detailed list of all the persons in the [company](#) shown above. Mark a person to see specific personal details.

**4** | This views a detailed [description](#) of the selected contact.

**5** | Here you see the [links](#) that are related to the chosen contact.



## 4.1 | Create company or person

In the contact module you will see that your [menu](#) now has a section called [contacts](#). This is your gateway to handling the [module](#).

**1** | As the picture shows you can [create and edit contacts](#) as you wish. In this lection we will investigate how to [create a new company](#). Note that to [create new person](#) you follow the exact same procedure. Just choose [person](#) instead of [company](#). In this example choose [create company](#) and a new window appears.

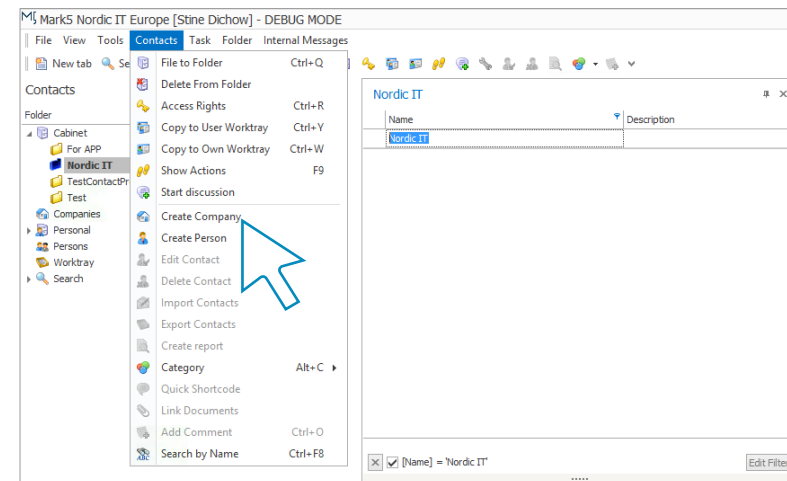
**2** | Now you will see the [editing area](#), similar to screenshot 2. To edit [access rights](#) click on the key in the upper left corner. Here you can choose either [everyone](#), [private](#) or [custom](#). You can add [links](#) to your contact in the lower left corner. This can be usefull if, you want to link mails to a certain company, department or person.

To [create new company](#), enter your details. You can connect as many addresses to your companies you wish by clicking on [add new address](#).

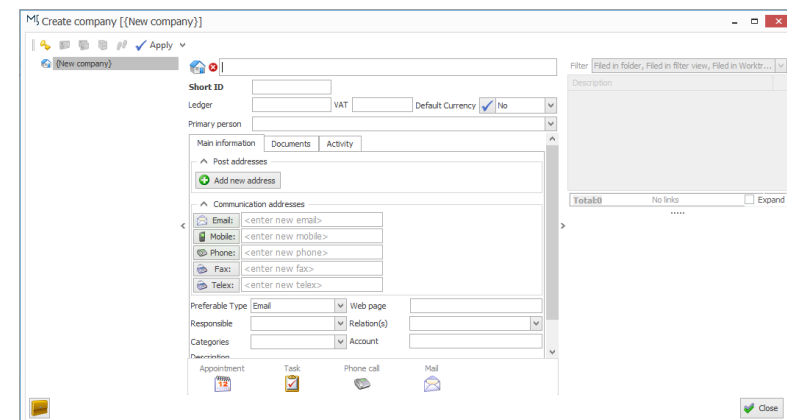
**NOTE** | To [create company](#) you have to click [close](#) in the lower right corner. This might seem odd, but when you click close, a window will pop up asking you if you want to [save changes](#). Click [save](#) and your company will now exist in your [contacts](#). This fact does also apply when creating [persons](#).

You can always edit a contact simply by right-clicking on the contact in question and choose [edit contact](#).

1.



2.



## 4.2 | Add contact to client

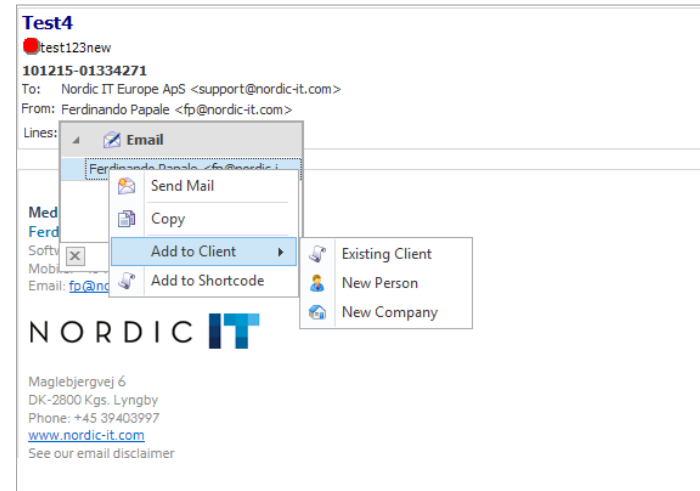
You can save contacts directly from emails as well. This can be preferable if you are working in the document module for easy access.

You can access contact details on email-addresses anywhere in MARK5. Just click on the **email** in question. This will open a small window with **email details**. Right-click on the **address**, choose **add to client** and choose whether you want to file into **existing client**,

**new person** or **new company**.

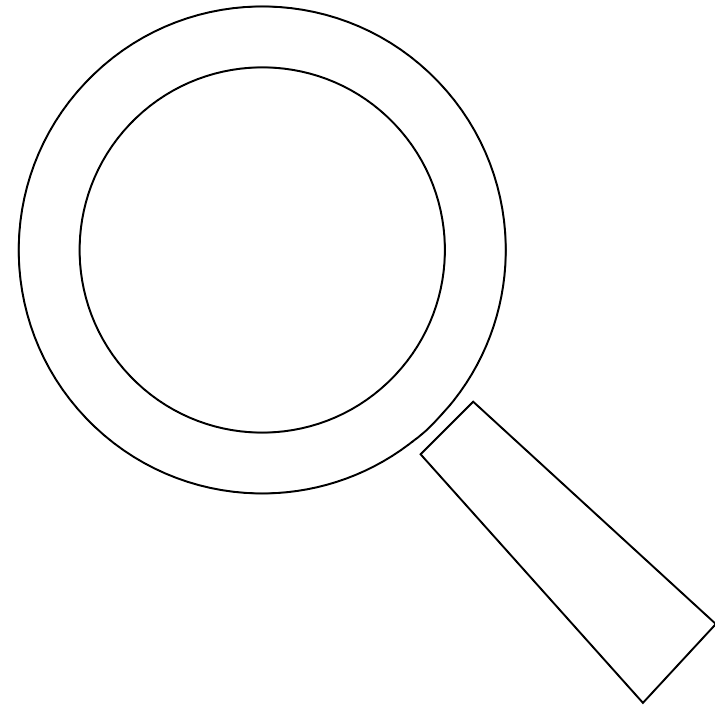
In the screenshot you can see the entire process visually.

**EXERCISE** | Add a company to contacts.  
Add 3 persons to contacts.  
Add your 3 new persons to the company.



## 5.0 | *Search functions*

In the following chapter you will learn to create **advanced searches**. The search in MARK5 is highly detailed as well as fast.



## 5.0 | Search functions

You can search either by choosing [search](#) in the [menu](#) or by pressing [F8](#). When doing so a new window appears, but notice that the window will change according to what kind of tab you are searching for (document, contact and so on).

You are able to specify your search as you wish, and you can have [multiple searches](#) at the same time. You can search for a specific [company](#) or [person](#), [outgoing](#), [incoming](#), [external](#), [text](#), [attachments](#), [date range](#) or [communication lines](#). In the [search string](#) you type in criterias. In from and to you can search for specific addresses. In [category](#) you can search for documents assigned to a certain category. In direction you search for [incoming](#), [outgoing](#) or [both](#).

In [Comm. lines](#) you can specify which email addresses the mails should come from. In creator you search for a specific users emails. [Date range](#) allows you to search in a specific period. In [comments](#) you can search through comments in documents. Under [Max to find](#) you choose how many result the search should find.

In this example our [search object](#) is [documents](#). Now, type in your criteria's. Choose whether you want to search in the [subject](#), [message](#) or [both](#). Next, type which words should be in the body. This is done in [search string](#). In this example we want to locate documents related to testing MARK5, so we type in: "test" and "mark5". The results will be all documents with both words present. You can also type in "test" OR "mark5". Then the search results will consist of documents with one of the words present.

## 5.0 | Search functions

When searching you need to know how to use **OR**, which is pointed out in the following example:  
Type into **search string**:

**Scenarios:**

You want to locate documents consisting of both  
test & mark5:

**Mark5 test**

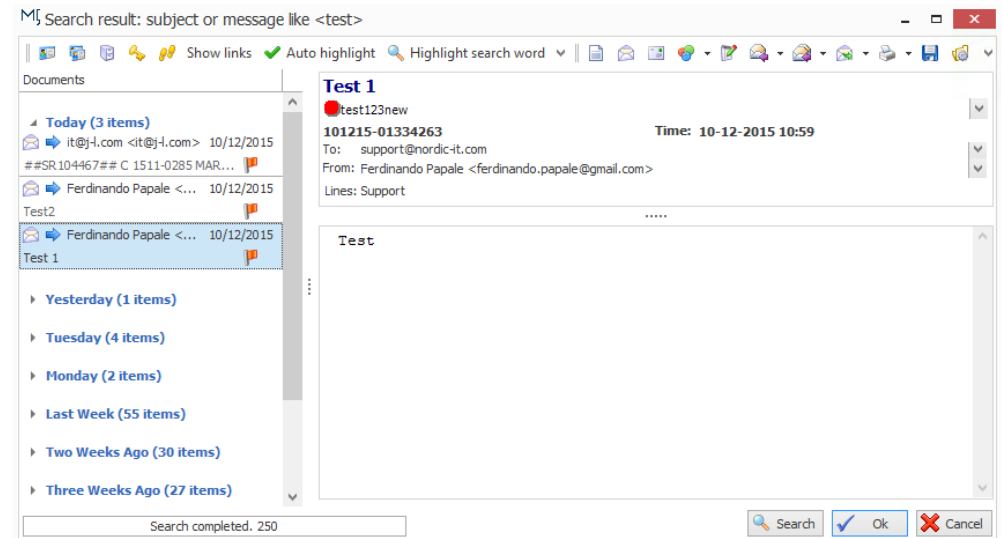
You want to locate documents consisting of either  
test or mark5:

**Test OR mark5**

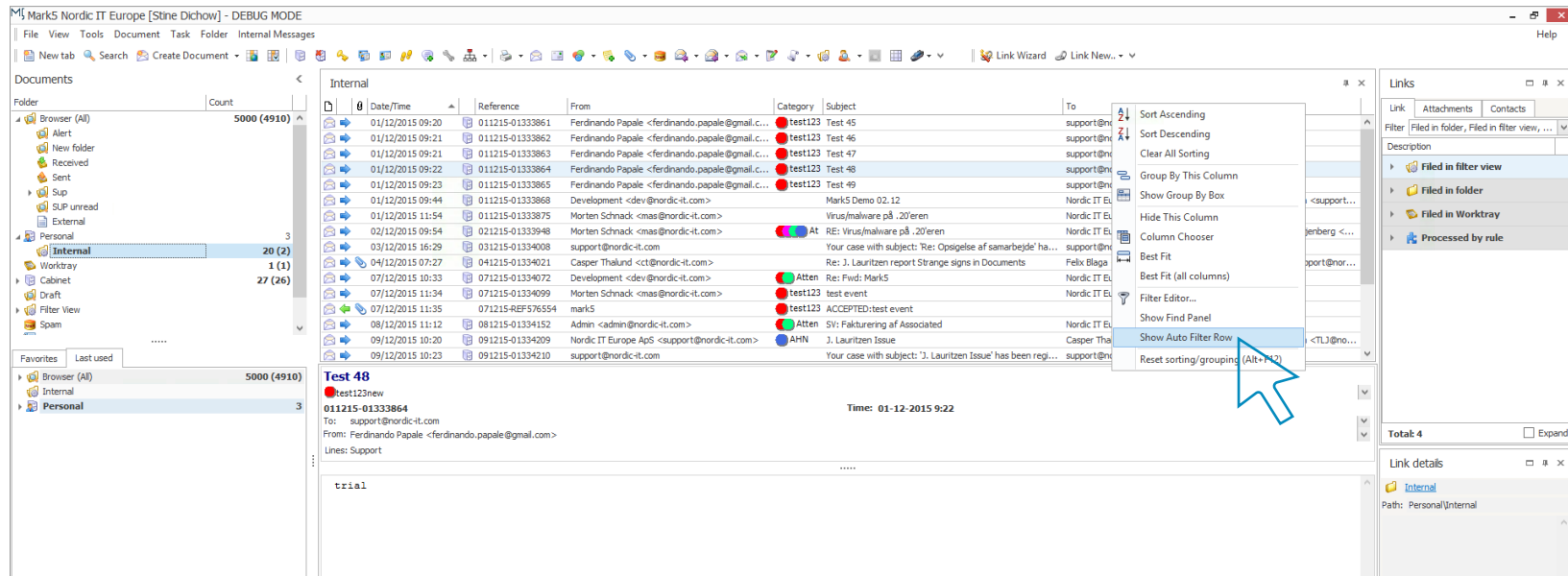
You want to locate documents with the exact phrase:  
mark5 test:  
**"Mark5 test"**

After entering your criteria press **search**. In the picture you see how the search results look in this example.

**NOTE** | The search saves itself just remember to click OK. Searches are deleted by every sixth search. You will be able to find the saved searches below the **cabinet** and **work tray**.



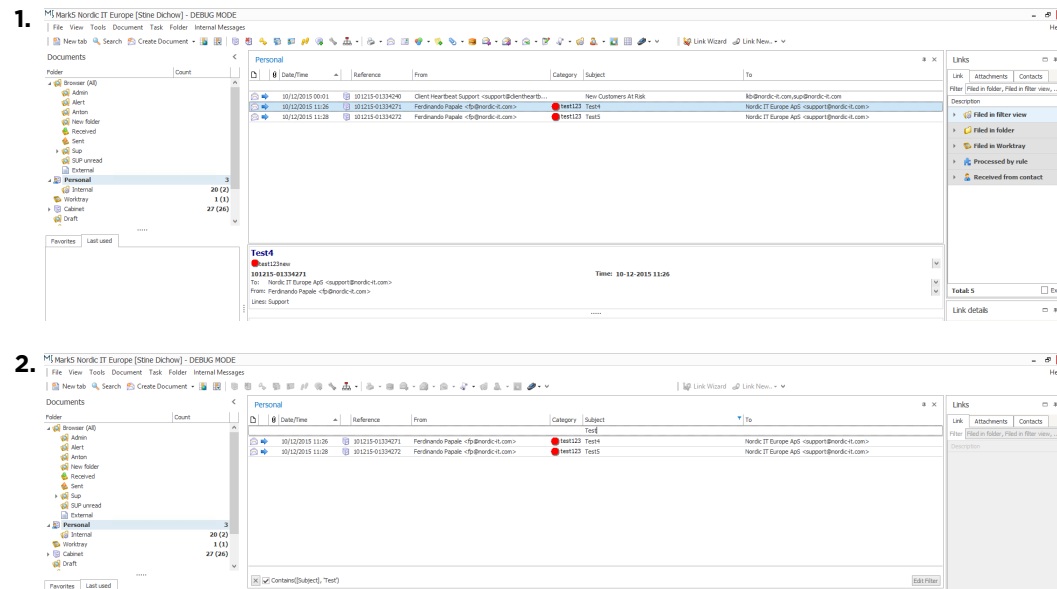
## 5.1 | Auto Filter



**Auto Filter** is a fast way to **sort messages**. **Auto Filter** is a specified function of searching that allows you to search for documents by the first word and display the records based on the latest number of records that you have specified in the **module settings**. Auto filter is a fast way to access mails with rather easy specifications for example if you want to locate every mail from Nordic IT, you can type in "Nordic IT" in the from column.

In this exercise we will learn how to **add** and **delete Auto Filter row**. First take a look at the picture above. What the picture tells you is, that you need to right-click on the **header** and then choose **show auto filter row**. This will create a **new row**.

## 5.1 | Auto filter



**1 |** The row allows you to type in whatever you want to search for. You can search in whatever column you want to; just click in the new row below the column of choice and start typing. In this example we want to locate every mail with the subject "test". Type into the subject column.

**2 |** As you can see in picture 2, MARK5 immediately delivers the mails with the wanted specifications. If you want to delete the auto filter row, just press the x button below the results.

**NOTE |** If you want to search for something, but you don't know the exact phrase, you can use the wildcard:\*. E.g. you want to search for Nordic IT, but you cannot find what you are looking for. You can type in : N\*rdic IT. The \* represents the wildcard and will search for every variable.

Remember to clear your searches to get full view. Use backspace to delete.

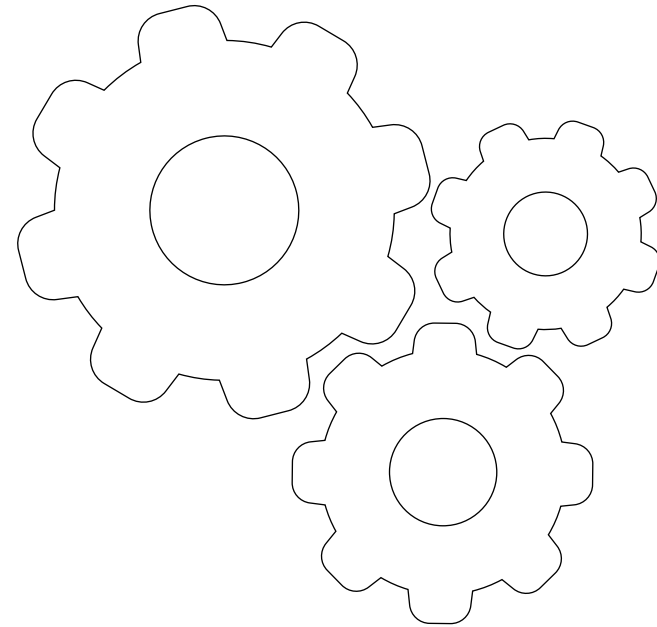
**EXERCISE |** Create a search that has at least 2 search strings. Use auto filter row to search for mails from Nordic IT.

## 6.0 | *Settings*

In the following chapter you will learn to modify your **personal settings**, to ensure that your individual adjustments fit your needs. You will learn to **change password** and **create templates**.

MARK5 is highly adjustable.

To customize your settings in MARK5 you need to use the **settings icon**. This can be found in the **icon-bar** and appears as a tool.





## 6.1 | *Change password*

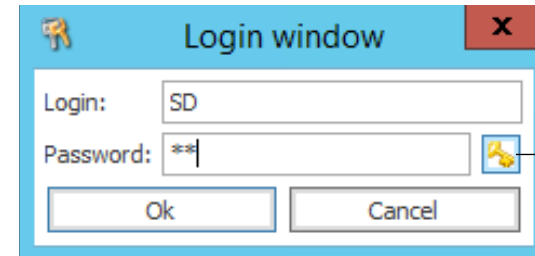
Lets start by [changing password](#). Open MARK5 from you desktop.

**1** | Here you will meet the [login](#) window. To change password, type in your [login](#) and your [password](#). Instead of pressing ok, press the [key-icon](#) marked in the screenshot.

**2** | This will open the [change user password window](#). Type in your old password, followed by your new password twice and click ok.

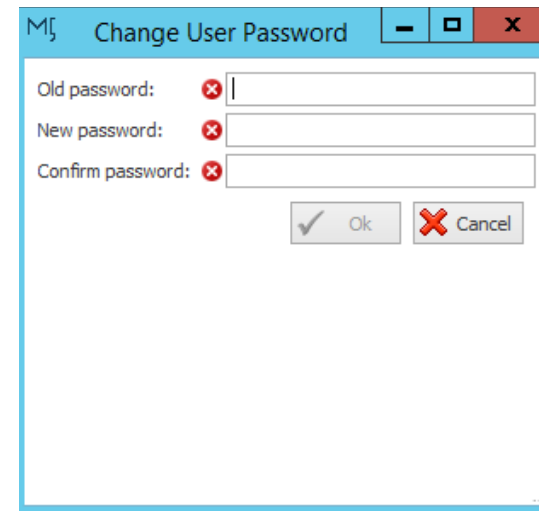
**NOTE** | Passwords are case-sensitive so remember exactly how the letters where typed in.

1.

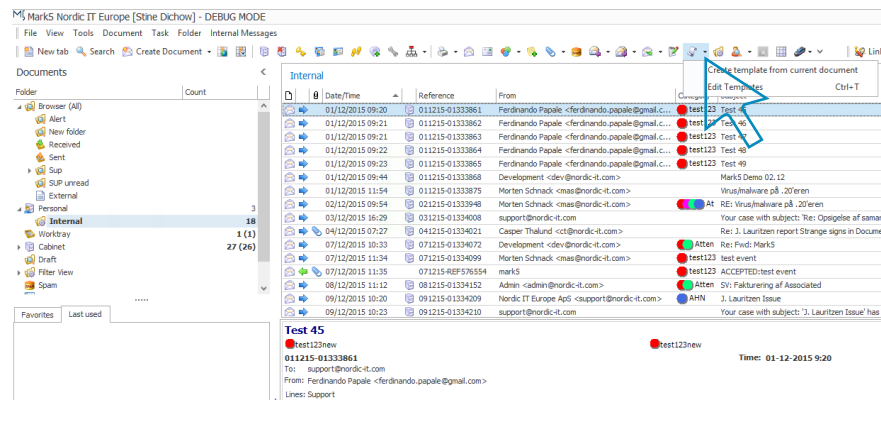


Click here to change the password

2.

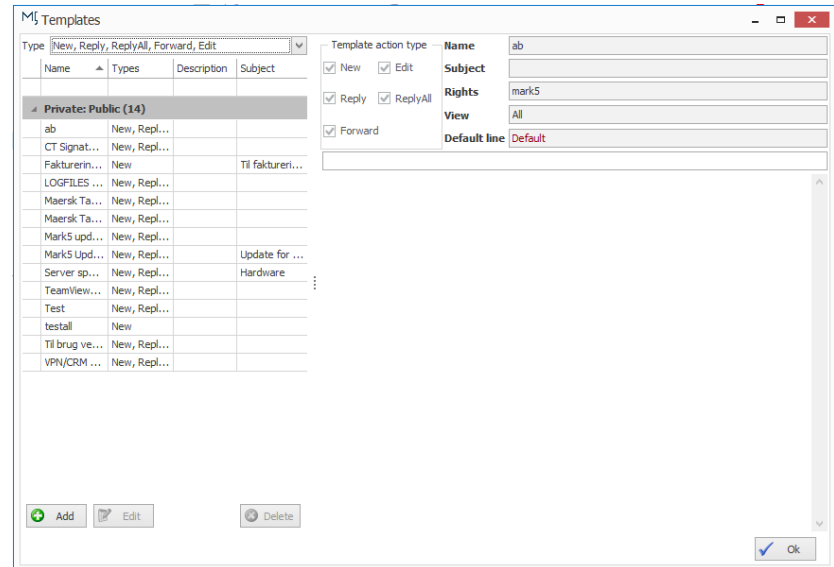


## 6.2 | Templates



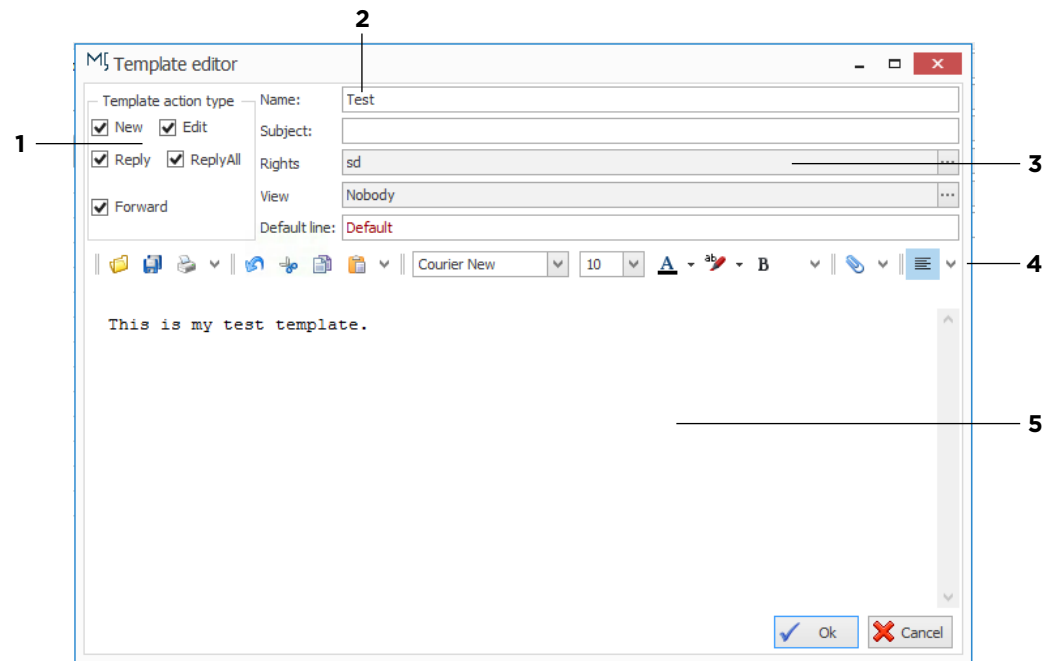
When you send out many emails, you can work more efficiently by using [templates](#). That way, you avoid entering sender details every time you compose a message. There is no limitation to the number of templates you can add. Therefore, you can prepare templates to diverse situations and set them to [appear automatically](#) on mails in certain situations. Lets take a look at how you [create templates](#).

Click on the [template icon](#) in the [icon-bar](#). Make sure you click on the [small arrow](#) just beside the icon. Choose [Edit Template](#). To edit template, you can always just press [Ctrl+T](#).



This will open your [edit template window](#). In the window you see a split screen. On your left side you see all [available templates](#). In the bottom you have three buttons: [add](#), [edit](#) and [delete](#). The right side views the [display-area](#). This is the content of the template, you have marked in the left pane. If you want to edit an existing template: press [edit](#).

## 6.2 | Templates



Now we want to create a new template. Start by clicking the [add button](#) in the lower left corner. This opens your [template editor](#), similar to the screenshot. Here you [create the template](#).

**1** | This is the template [action type](#). Here you choose which [context](#) the template is meant for.

**2** | Type the [name](#) of the template.

**3** | Pay attention to [access rights](#). Choose whether you want the template to be [public](#) or [private](#). Click on the [three dots](#) at the end of the line to [modify settings](#).

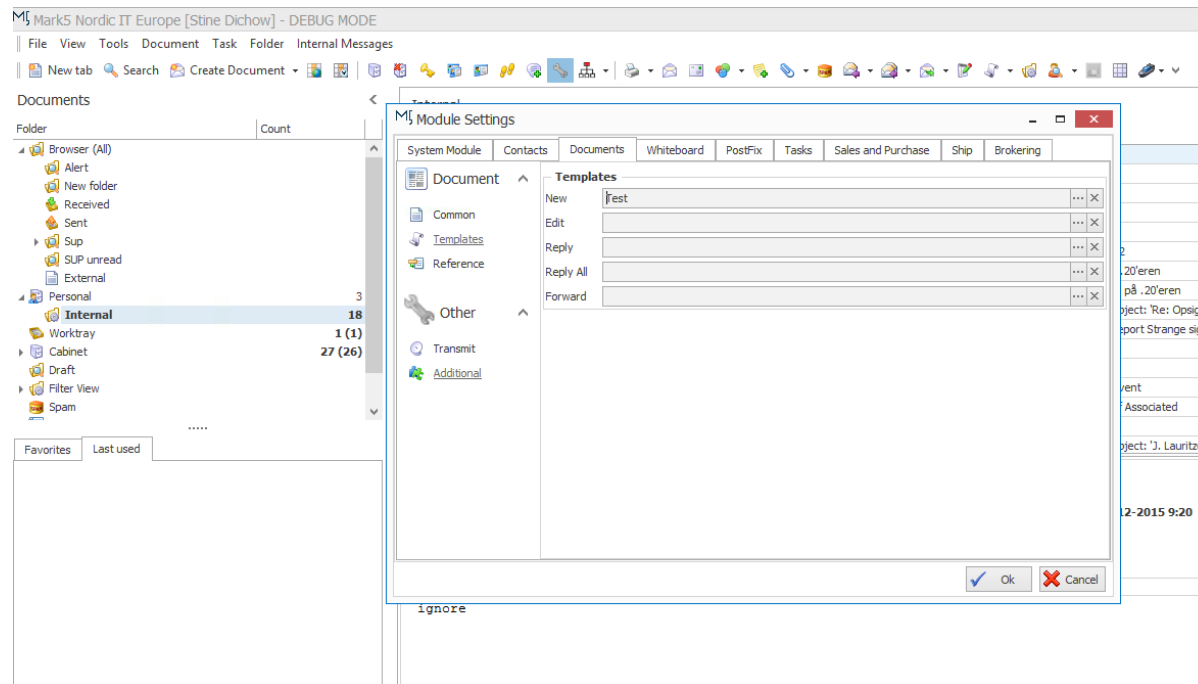
**4** | This is your [editing tools](#). You can modify type and insert image.

**5** | Here you set up the actual [template](#). You can [type](#), [use cut & paste](#) or [add images](#) as you like.

When you finish, press [ok](#).

Now you will be able to see and choose your new template from the [template window](#).

## 6.2 | Templates

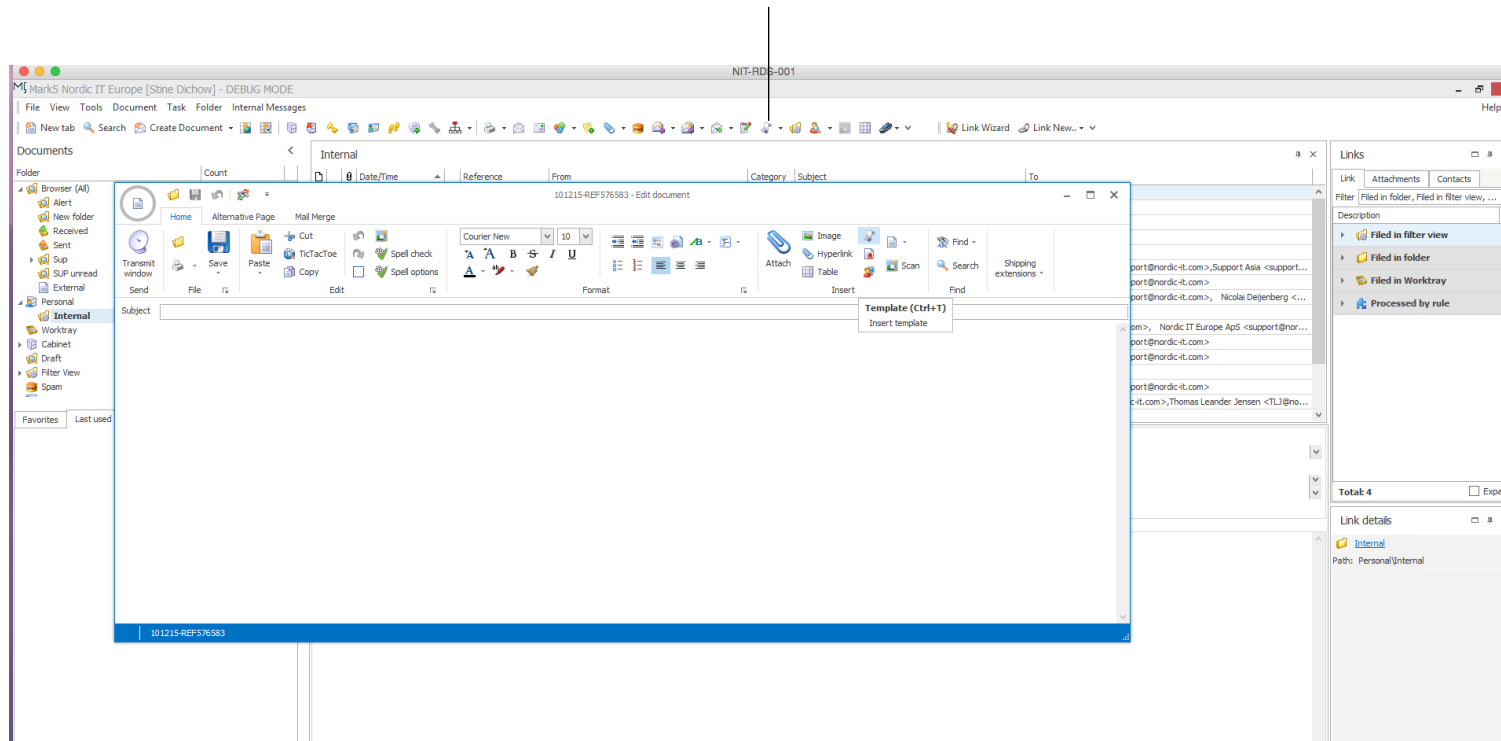


**NOTE** | The template will not appear when you write emails, as it has not been assigned yet. Assign through [settings](#) as shown in the screenshot above. Click on the [setting-tool](#) in the [icon-bar](#) and your [module settings window](#) appears on the screen.

To activate templates make sure to choose [documents](#) in the [navigation bar](#) and then [templates](#). On your right you can choose templates by clicking on the [dots](#). If you want to [remove templates](#) click on the [X](#). You can add different templates to different situations: [new](#), [edit](#), [reply](#), [reply all](#) and [forward](#). When you finish click [ok](#).

## 6.2.1 | Insert template in email

Click on the template icon (or Ctrl+T) to insert template

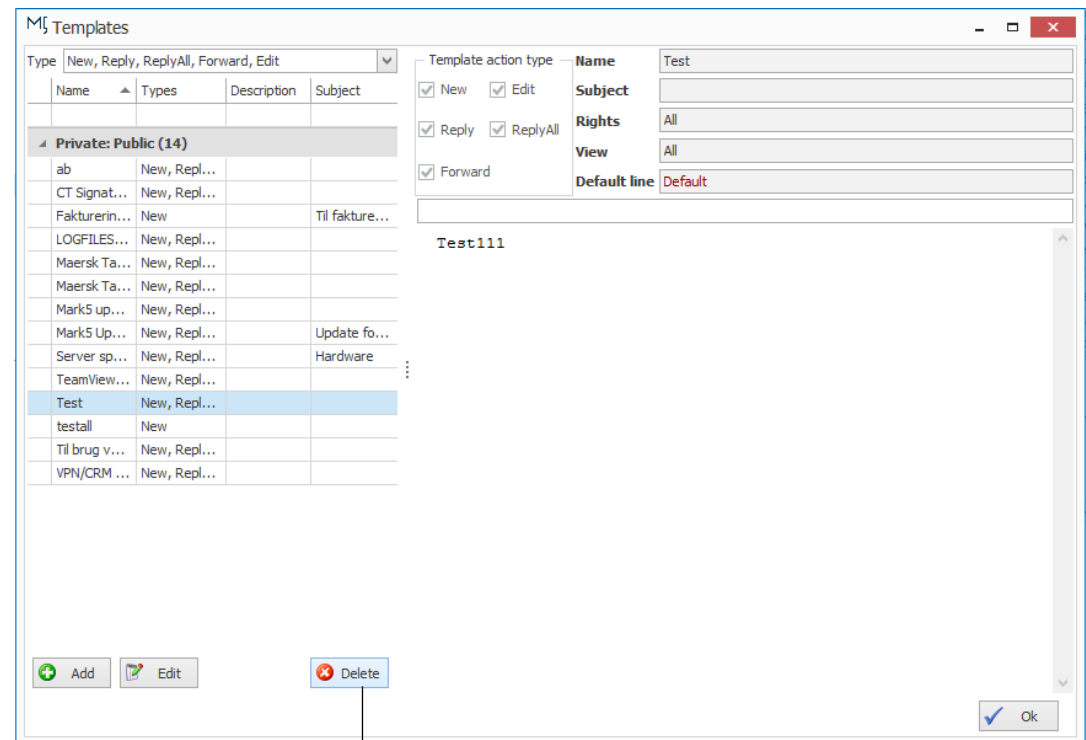


To insert a template into an email, [create document](#) and you [edit document window](#) will open:  
To [insert template](#) either click [Ctrl+T](#) or go to your [attachment area](#) in the window and click the [template icon](#) as shown above.

This will open the same [template window](#) as we experienced earlier. Here just click on the template you need and click [ok](#). This will insert the [template](#) into your [editing mail area](#).

## 6.2.2 | Delete template

To delete a template go to the arrow beside **documents**, click **edit template** and the template window shows. Just mark the template in question and press **delete** as done in this picture.



Delete template

## 6.3 | Set to out of office

If you need to create an [auto response](#) to [incoming emails](#) use: [out of office](#). Go to your [menu](#), choose [document](#) and click [out of office](#).

This will open your [autoreply window](#). Here you can choose to activate now or you can set a specific period of time. Under [Incoming Line](#) you have to choose your own email-line. Type in the [Reply Subject](#) and your message.

**WARNING** | It is not recommended to use out of office as you use the same email addresses and this will affect everyone.

Mj Autoreply

Active from now  Define active period

10-12-2015 to 24-12-2015

Incoming Line

Reply Subject

Courier New 10

Type the message you want to send back when recieving an email.

Ok Cancel

**EXERCISE** | Create a template  
Activate the template  
Send an email using the template