



BASIC GUIDE



0.0 | Welcome

This user-guide will introduce you to the basic functionalities in reMARK.
We will go through emails, contacts, search and mailing lists.

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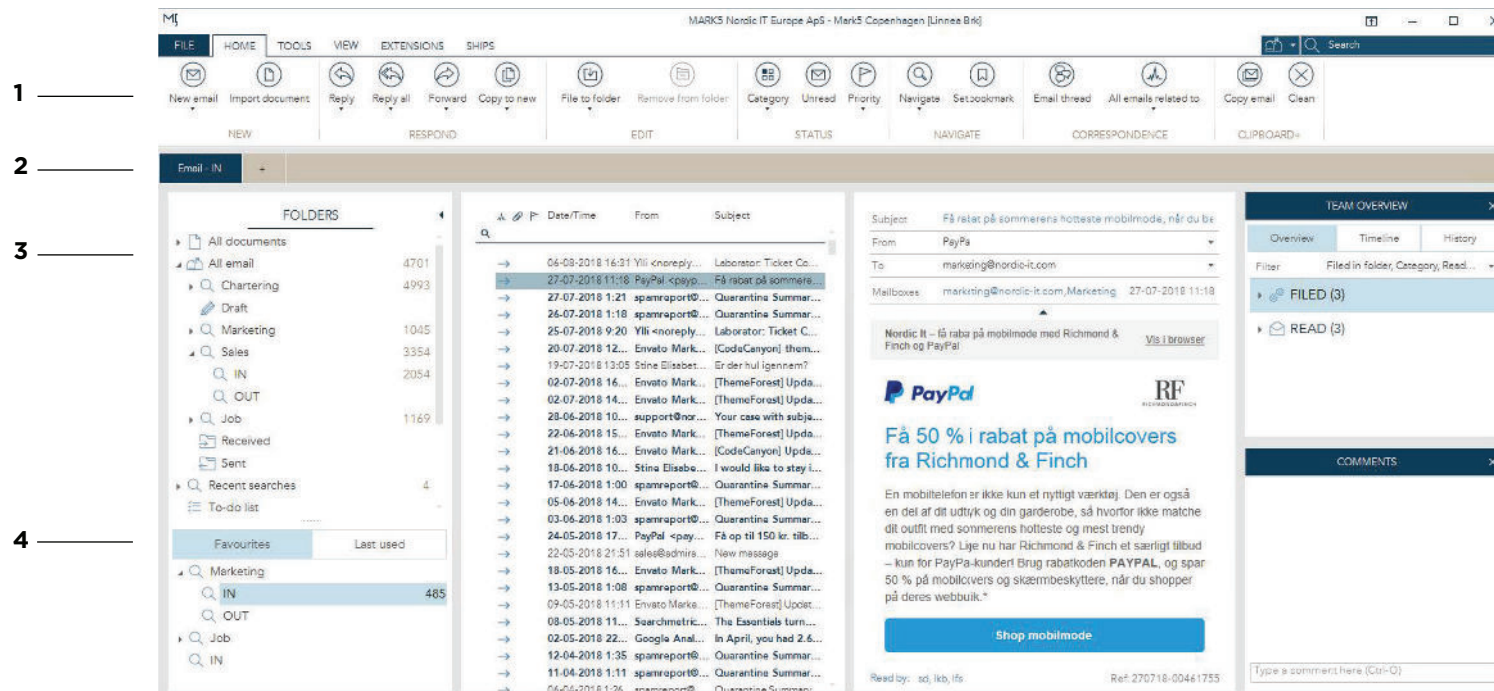


1.0 | Emails

The following chapter will introduce the basic navigation and work area in emails. Also, we will go through how to send an email, how to use filter row and how to create a template.

Emails is where you can read, receive and send emails. It is designed to provide overview and optimal conditions for editing and composing emails in a fast and easy-to-read way.

1.1 | Quick overview

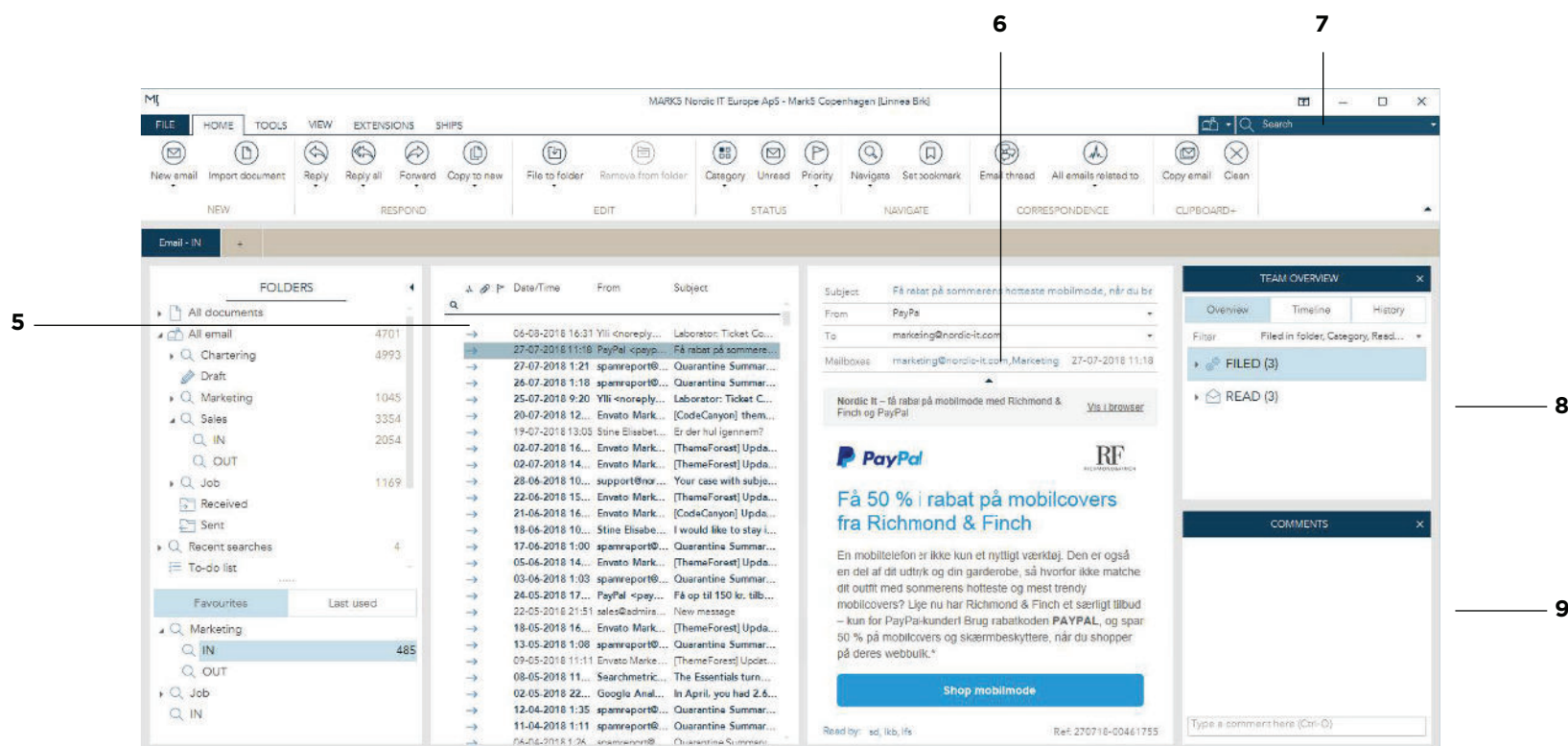


1 | In **toolbar** you access email functions. It is sectioned in three tabs; **home**, **tools** and **view**. Below the tabs you find the functions, organised and placed in a suitable tab. They are grouped, based upon functionality. Group names are shown in the bottom typed in brown. For detailed information about a function, place your mouse on top of it to see an explanation.

2 | **Tab menu** is just below the toolbar. Click on the plus to create new tabs of content such as email, contacts, calendar, mailing lists and search.

3 | In **folders** you can navigate through your email folders. Click on the arrow on the left side of the folder to expand and collapse. Right-click on a folder for more options (for more details, see chapter 1.2)

4 | **Favourites**. Add your favourite folders for easy access or tap to **last used** to see recent folders. Right-click on the folder in question and choose **add to favourites**.



5 | Email list

Click on a folder and the content will open in the [email list](#). Use the arrows on your keyboard to navigate through emails or click to select them. To search in the email list, use the filter row in the top of the list (for more details, see chapter 1.7).

6 | Mail view

Tap an email from the email list to view and read the actual email in the email view.

7 | Quick search

In the top right corner, you have quick search. First, choose which email address you wish to search in, then simply type

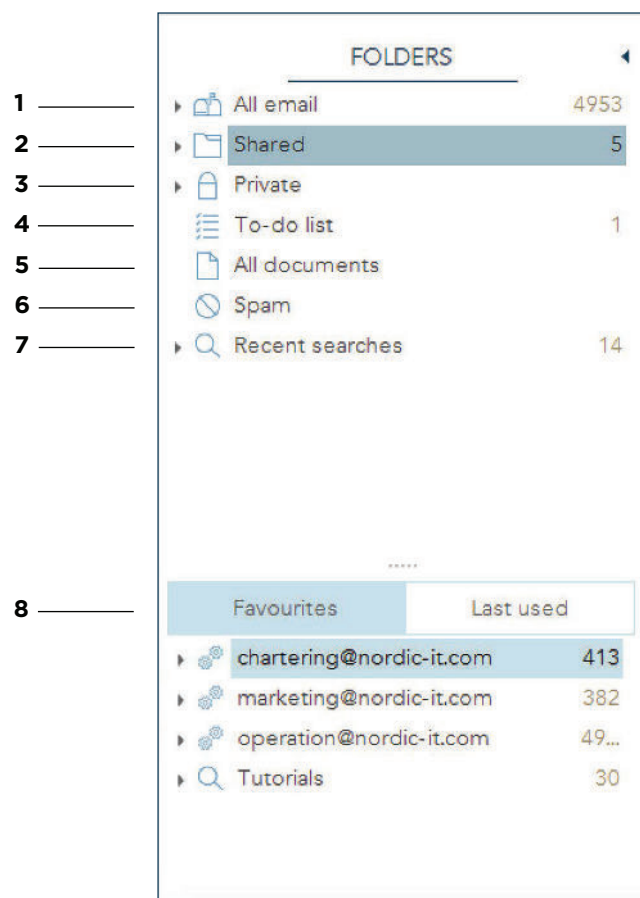
in a search word, choose to search everywhere or where specifically you want to search. Your result will appear instantly (for more details, see chapter 3.3).

8 | Team overview

When you click on an email, related actions will show in [team overview](#). Here you keep track of what team members have done to a specific email. It will only appear, if you enable [team overview](#) in the [view](#) tab in the toolbar. (for more details, see chapter 1.4)

9 | Comments is where you comment on emails and see if team members have left a comment (for more details, see chapter 1.5).

1.2 | Understanding the folder list



Folder list is where you find your email folders.

1 | **All email** contains every email you have access to, regardless of the email addresses. If you click on the small arrow you will see that it has 3 sub folders which are **received**, **sent** and **draft**. Click the small arrow again to hide the subfolders.

2 | **Shared** is meant to contain all shared email that you have access to. This means that every email you see here can also be seen by someone else in your team or organisation. We recommend that you create your company folder structure here using reMARK's different types of folders and filtering options.

3 | In **private** you have all of your private email. Nobody, but you, has access to the emails going in and out of your private folder. However, you will see private emails in **all email**, but you are the only one who can see that.

4 | **To do list** (used to be worktray) is a private folder that all users have. Both you and other users can place emails in your to do list. This way, colleagues can place emails in your to do list to draw attention towards certain messages, and you can do the same for them.

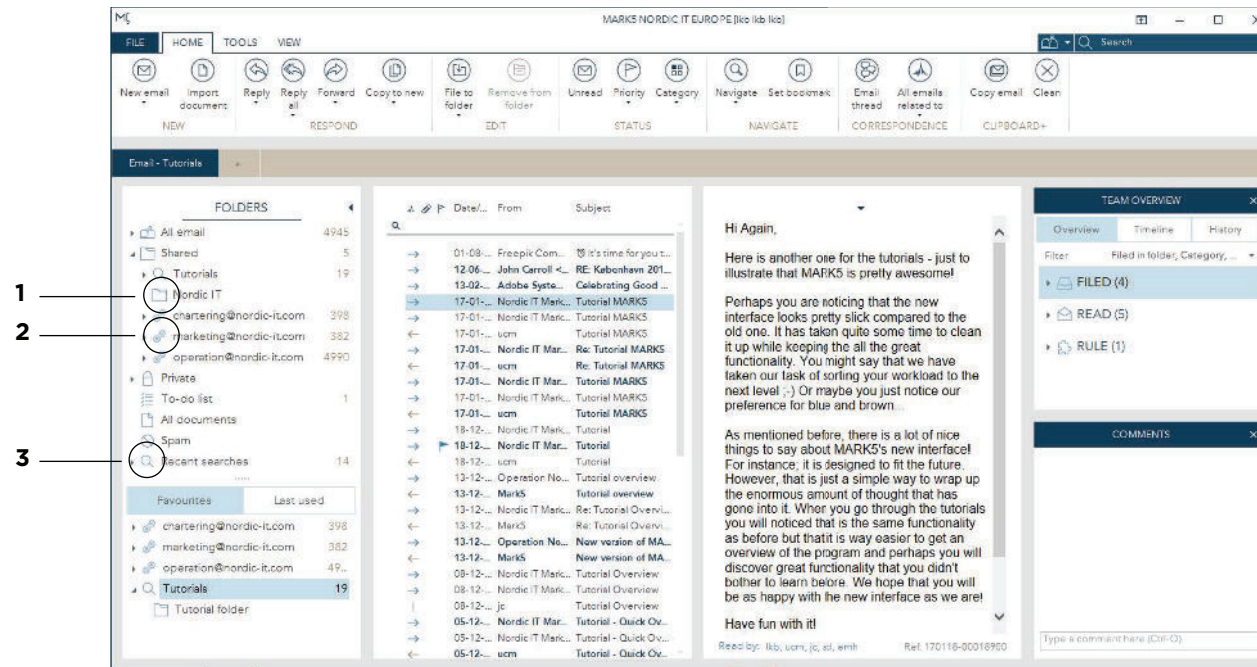
5 | In **all documents** you find all documents that you have access to.

6 | **Spam** is for spam emails.

7 | Through **resent searches** you get easy access to your searches without changing to another tab in the tab menu.

8 | **Favourites** and **last used** is where you can add a folder to favourites by right clicking on the folder and selecting **add to favourites** from the right click menu. Tap to **last used** to see the folders you last used.

1.3 | Different types of folders



ReMARK has different options for archiving and structuring emails with folders. These are **folders**, **smart folders** and **search folders**.

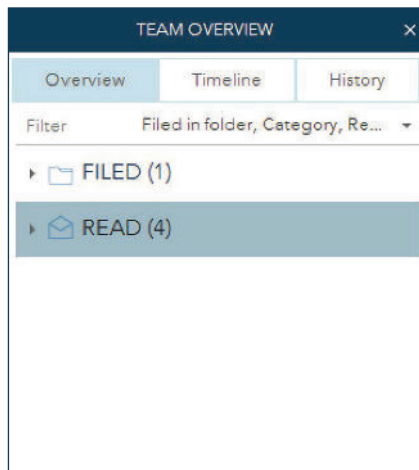
1 | **Folders** are visualised by a folder icon. These are regular folders, with no defined filter criteria where you archive emails manually.

2 | **Smart folders** are visualised by a cogwheels icon. Through Smart folders emails are automatically filtered according to one or various pre-defined criteria. Smart folders work from the time of creation and forward.

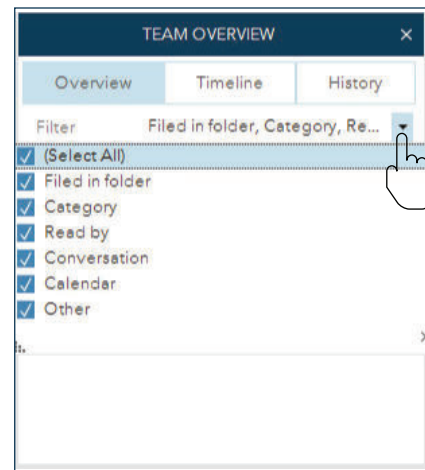
3 | **Search folders** are visualised by a search icon. Search folders are predefined folders that will search backwards into old messages according to how far it is set to go back in time. It will continuously update with new emails after the time of creation. The main difference from smart folders is that it goes back in time. Please note that search folders tend to get very heavy on the system, so these should be used with caution.

1.4 | Team overview

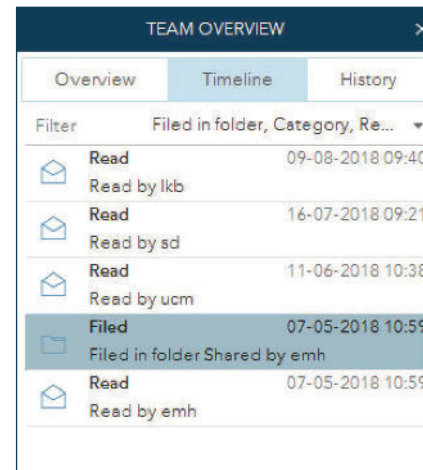
Team Overview allows you to keep track of which actions team members have executed on a specific email. It will only appear, if you enable **team overview** in the view tab in the toolbar. When you click on an email, related actions will show in **Team Overview** in the right section of Email. Team Overview consists of three different tabs: **Overview**, **Timeline** and **History**.



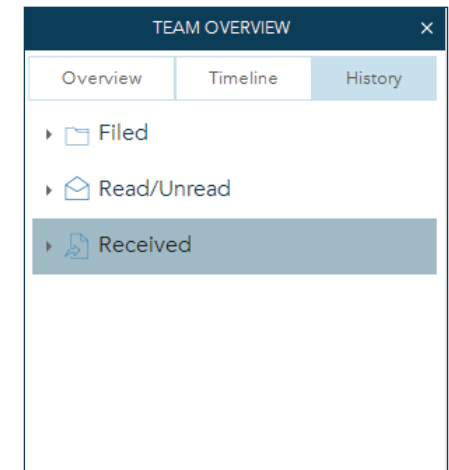
Overview is a quick summary of actions related to the chosen email. Actions are grouped together by type. The overview tab will only show actions that are relevant for the email, as it appears now. If you click on the arrow to the left, it unfolds, and all actions of the same type becomes visible.



You can customise what type of actions should be visible. Click on the black arrow at the top and tick off the actions you want to view.



Timeline is a chronological overview of the actions that are relevant to the email right now. Actions that have been undone will not be shown here. Like in overview, you can customise what type of action should be visible.



History keeps a full overview of all actions carried out on the selected email, including those that are no longer valid for the email. The actions are sorted into different types of actions. You can see a full chronological overview of each type of action by clicking on the small arrow next to the icon. When right-clicking on an action in the history tab press **show details** and a pop up will open with further details about the action.

1.5 | Comments

Here you can add and view comments on an email. This way team-members can exchange information regarding a specific email. You find comments in the right part of the screen. It will only appear, if you enable [comments](#) in the [view](#) tab in the [tab menu](#).

1. To add a comment to an email, simply start typing and press enter when you have finished.

2. The comment is now visible to anyone with permission to see the email in question. The comments will be chronologically organised, and the active one will be highlighted in light blue. You can view who send it, at what time and date.

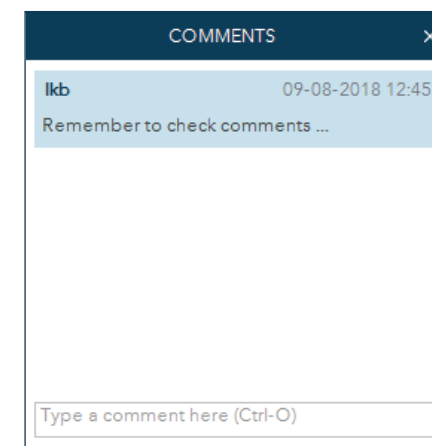
1.



A screenshot of a web application window titled "COMMENTS" with a close button (X) in the top right corner. The main area is empty. At the bottom, there is a text input field containing the placeholder text "Remember to check comments ...".

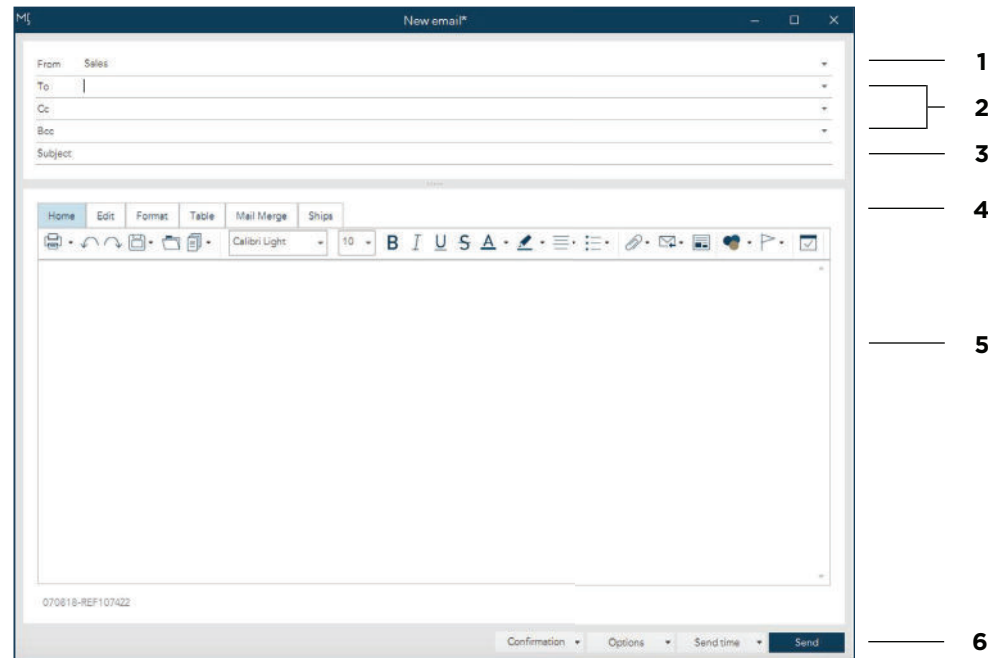
Type comment
here.

2.



A screenshot of the same "COMMENTS" window. It now contains a single comment entry highlighted in light blue. The entry shows the user "lkb" on the left, the date and time "09-08-2018 12:45" on the right, and the text "Remember to check comments ...". Below this entry is a text input field with the placeholder text "Type a comment here (Ctrl-O)".

1.6 | Send email



To create a new mail either press **F2** or click the **new email icon** in the **toolbar**. A pop-up window will open, where you can create a new email (see the picture above). The new email work area is divided into two areas: In the top you choose email address, receivers and subject. Below you compose.

The following will teach you how to send an email:

1 | First, choose an email address to send your email from. Click on the arrow next to **from** and choose from the drop-down menu.

2 | Choose recipient by clicking on the arrow on the right side of either to, **cc** or **bcc**. In this dropdown, navigate between tabs at the top. Start adding recipients by double clicking on them and a list of recipients will show at the bottom.

You can easily filter in the row by typing information in order to locate certain receivers.

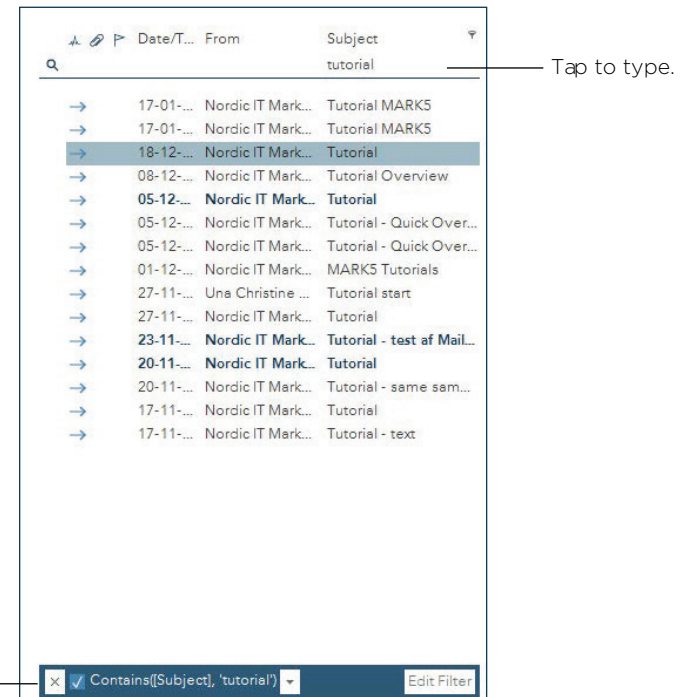
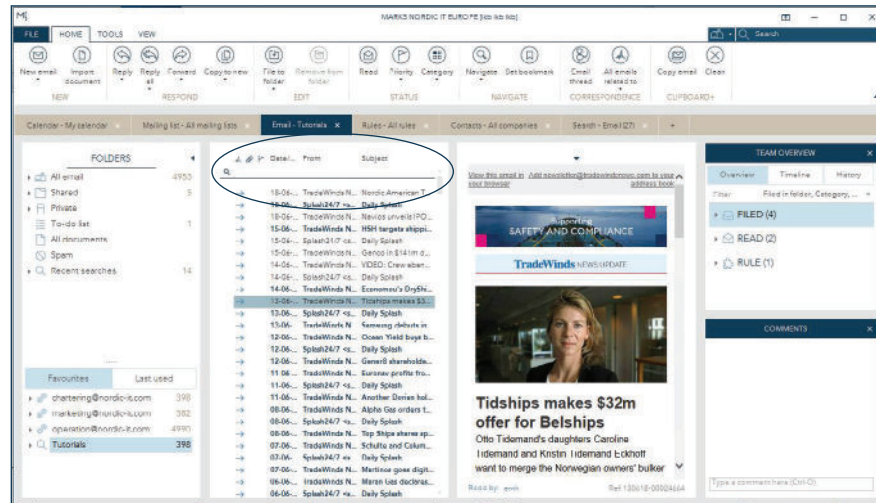
3 | After selecting your recipients, enter a **subject**.

4 | Navigate between tabs for more functionality to compose your email.

5 | Write your email.

6 | When your message is done, press **send**.

1.7 | Filter row

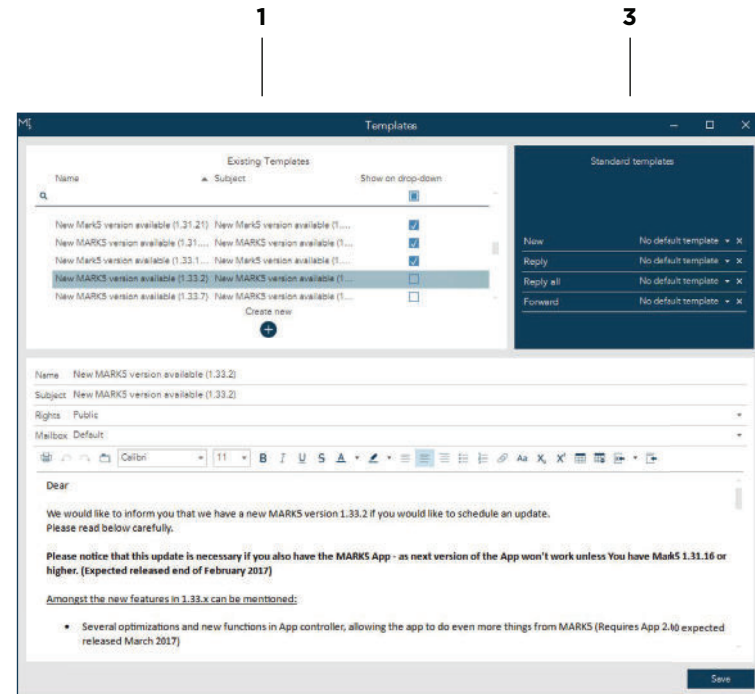
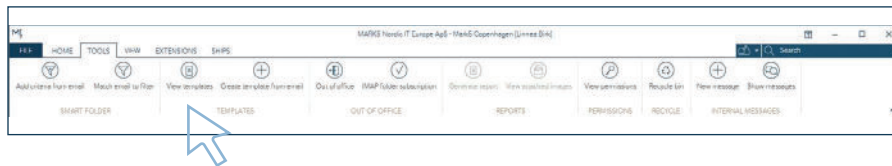


Press x
to reset

Filter row is a quick and efficient way to filter emails, making it easy to find the emails you need. You can find filter row at the top of your email list, next to the search icon (see the picture above). This is a row where you can search through emails according to the columns in your email list. Here you can search through read and unread, status, attachments, priority, date and time, from or subject.

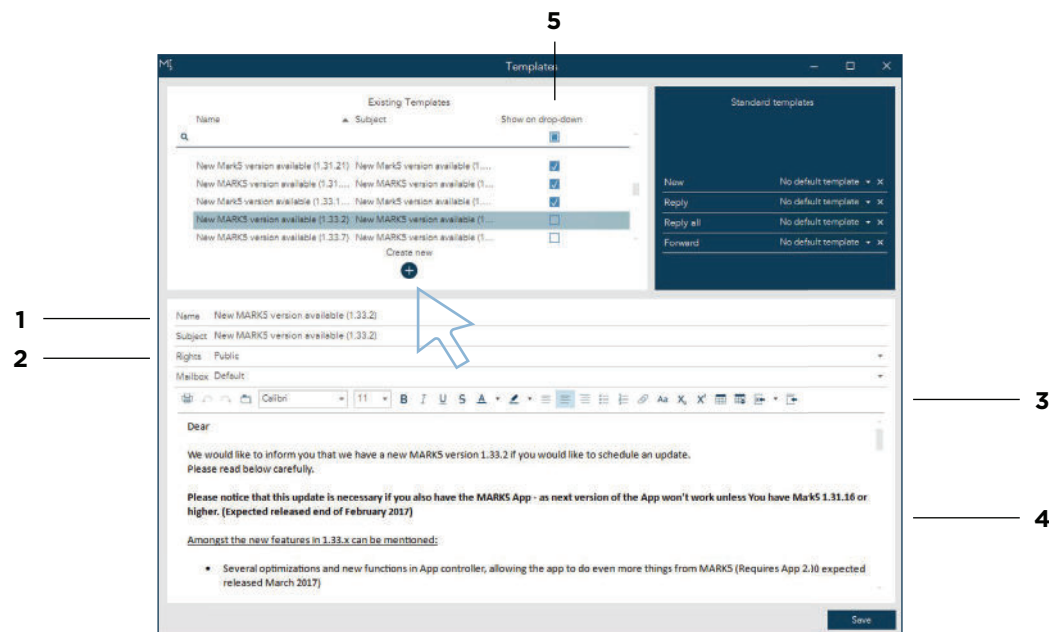
1 | Search by pressing the blank space underneath the column you wish to search in until it is highlighted in light blue. Type in your search keyword.
This will automatically filter through the emails in your email list and let the filtering result appear underneath the filter row.
2 | When you are done and want to return to all your emails, close the blue bar in the bottom.
NOTE: You can find filter row in various places in reMARK. For instance under **emails**, **contacts** and **mailing list** where it has the same functionality to filter through and across the lists you are working in.

1.8 | Templates



Press drop-down to set template as standard.

1.8.1 | Create template



Now you are ready to create a new template. To create a new template, click the + icon marked in the screenshot.

1 | Type the **name** of the template.

2 | Pay attention to **rights**. Choose whether you want the template to be **public** or **private**. Click the bar to modify.

3 | These are your **editing tools**. You can modify, type and insert images.

4 | Here you set up the actual **template**. You can **type**, use **cut & paste** or **add images** as you like.

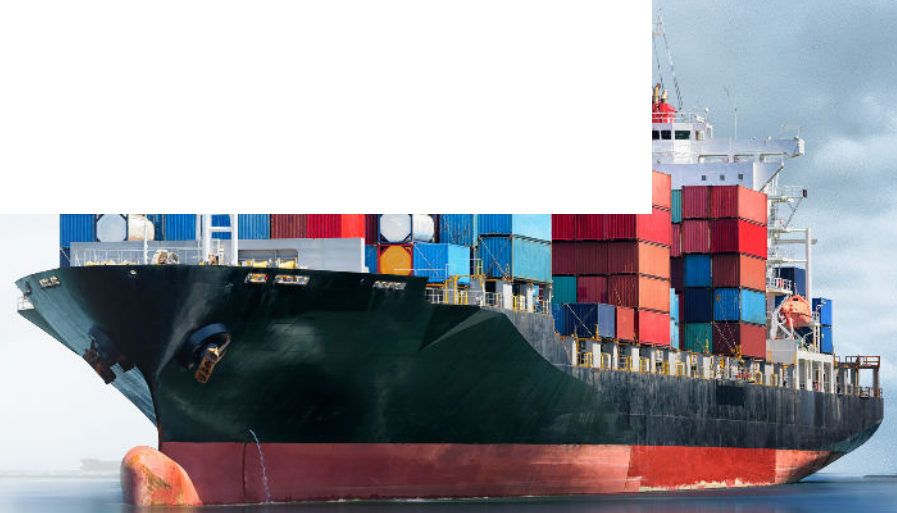
5 | You can insert your templates quickly when you create or reply to an email. Just check the show on drop-down box on the templates you wish to access when you create an email. The templates that you have ticked off will now appear on drop-downs when you create and reply emails.

When you have finished your template, press **save**.

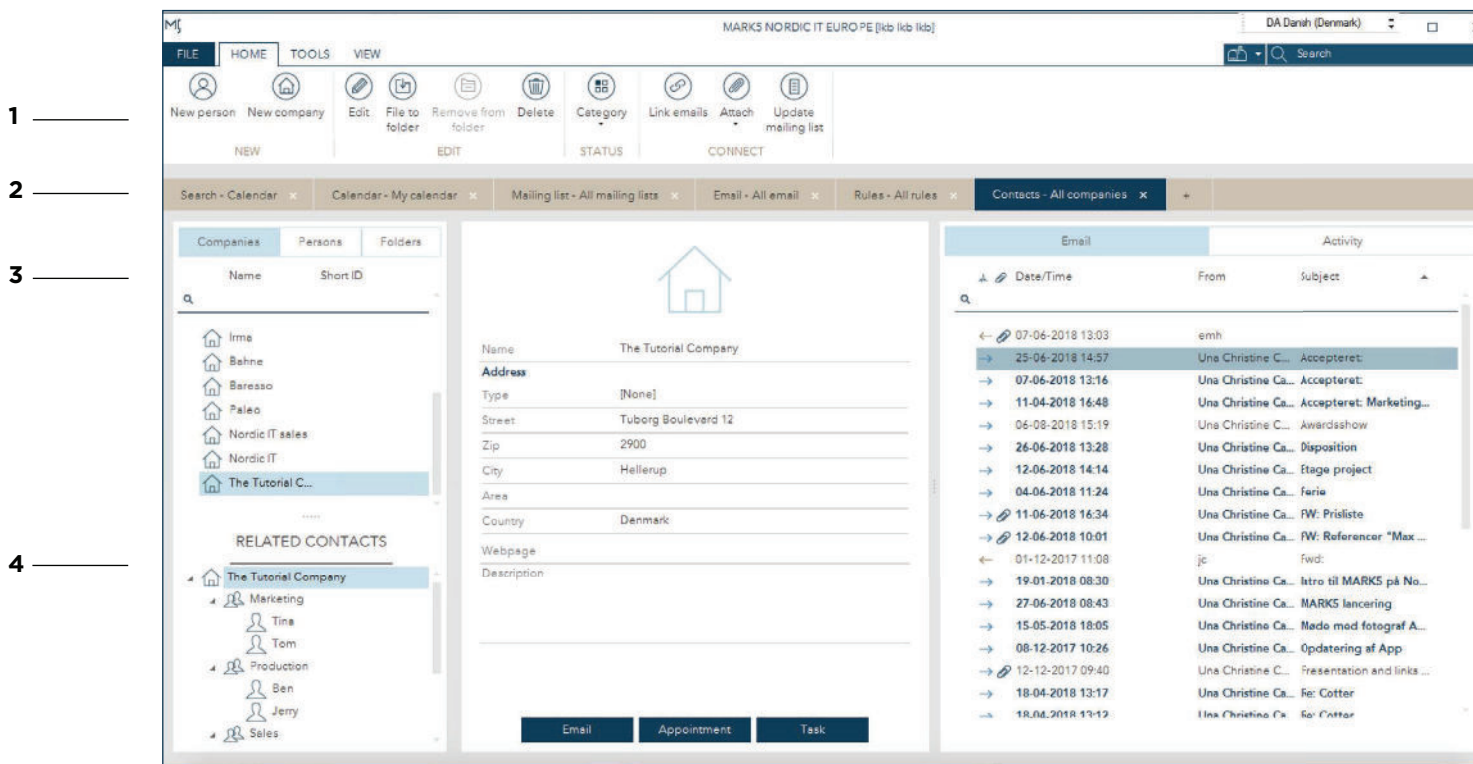
2.0 | Contacts

The following chapter will introduce the basic navigation and work area in contacts. Contacts is your address-book, where you can store information about contacts to share within the company.

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2.1 | Contacts overview



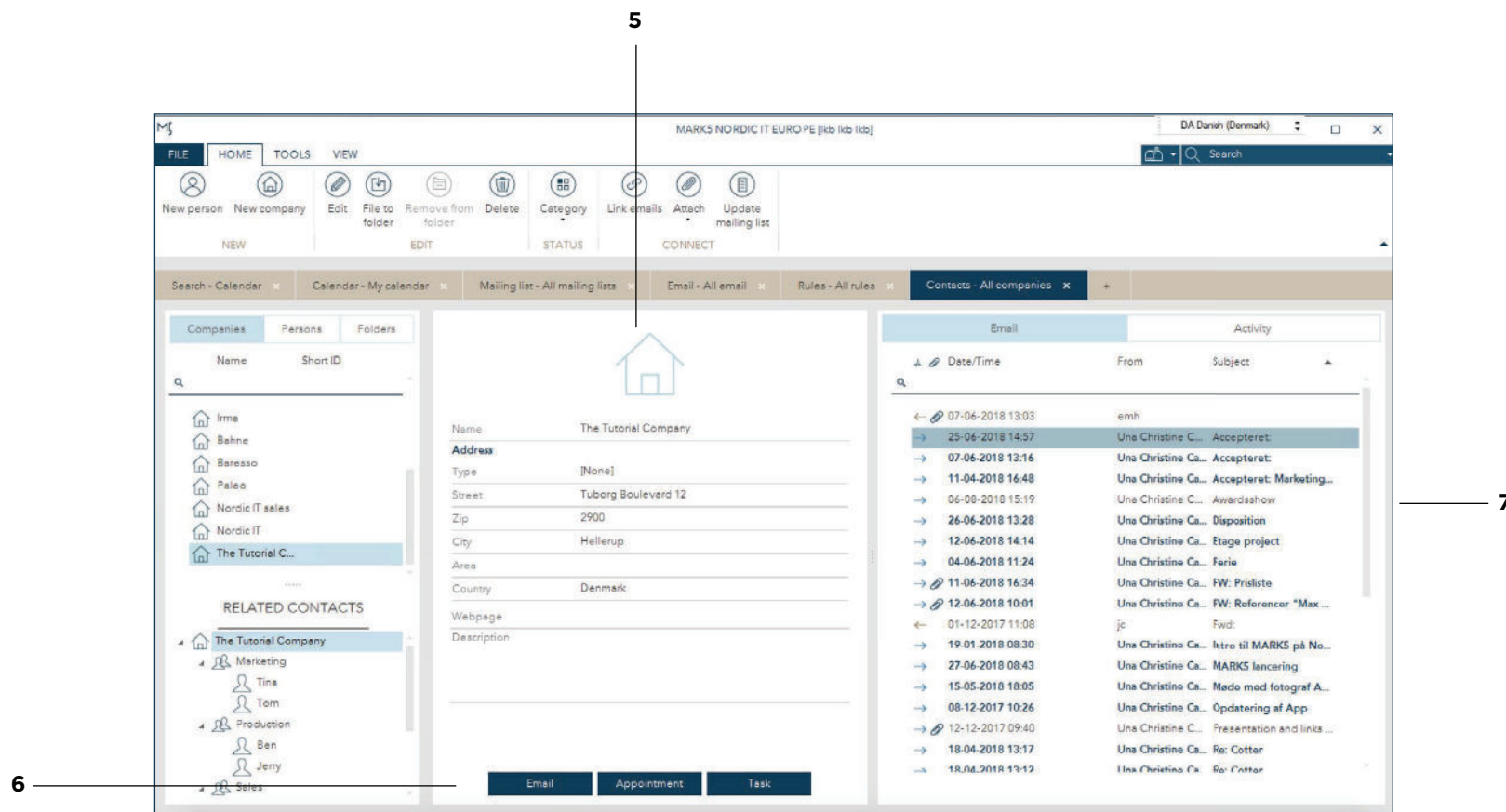
1 | **Toolbar** is where you choose and use specific functions. The toolbar is sectioned in three tabs consisting of relevant functions; **home**, **tools** and **view**. In **home** you find the most used contacts features. In **tools** you find less used features. In **view** you find layout related features.

2 | **Tab menu** is just below the toolbar. Click on the plus to create new tabs of content such as email, contacts, calendar, mailing lists and search.

3 | **Contacts list** is where you find all contacts. Tap between **companies**, **persons** and **folders** and use the filter row to limit the number of listed contacts. **Companies** is a list of all the contacts registered as companies. **Persons** is a list of all the contacts registered as persons and in **folders** is the old contact list structure.

4 | **Related contacts**
Click on a contact and you will see Related Contacts underneath. Contacts can be recognised based upon the icon beside as either:

- a company
- a department or
- a person.



5 | Contacts view

Click on a contact in the contact list to see its details in contact view. The icon indicates whether it is a company or a person you are looking at. Here we are looking at a company. Underneath you see all the details registered on the contact. The amount of details on a contact depend on what has been typed in. This means that you will only see the details relevant to the contact you have selected.

6 | Buttons

In the bottom of the contacts view, you see three buttons. They allow you to send an [email](#) to the contact, set an [appointment](#) with your contact or create a [task](#) for your contact.

7 | Related activity

Related preview is an overview of the entire correspondence related to the contact you have selected. Tap between [emails](#) and [activity](#). The [email](#) tab is a list of all the emails related to your contact. This means that you will see the emails to or from the contact, as well as the emails where the contact has been CC'ed or BCC'ed. You will only see the emails you have access to. The second tab is [activity](#) which contains the appointments and tasks related to the contact.

The background of the slide is a photograph of a port at dusk. In the foreground, a large red and white cargo ship is moving through the water, leaving a wake. In the middle ground, several smaller boats are visible. In the background, a long pier with multiple yellow and red cranes extends into the water. The sky is a mix of blue and orange, indicating sunset or sunrise. Hills are visible in the far distance.

3.0 | Search

The following chapter will introduce how to search in reMARK using either quick search or advanced search.

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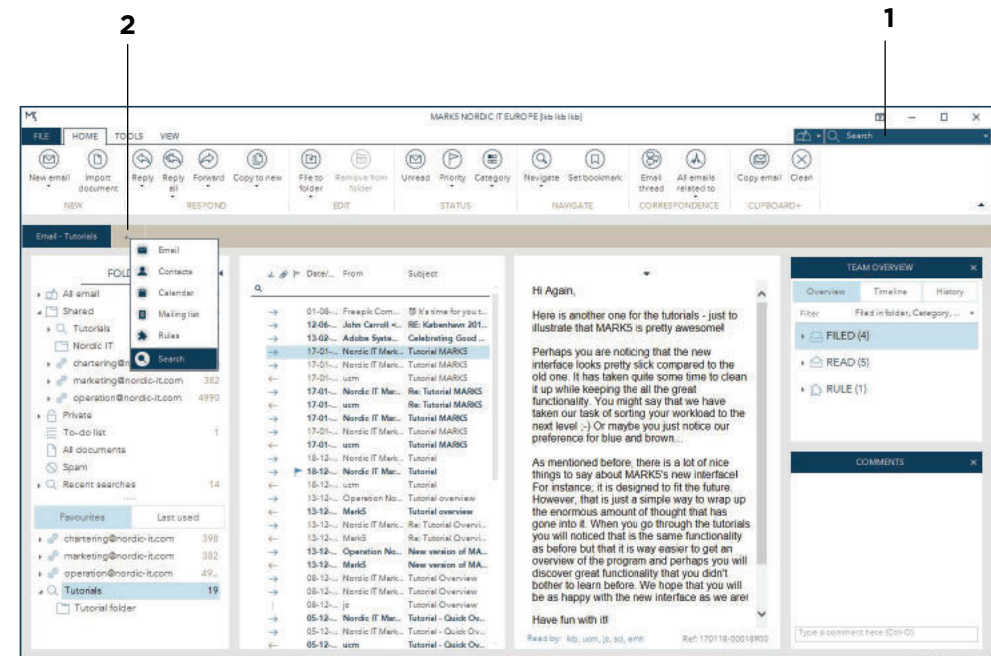
3.0 | Search

You have two ways of searching:

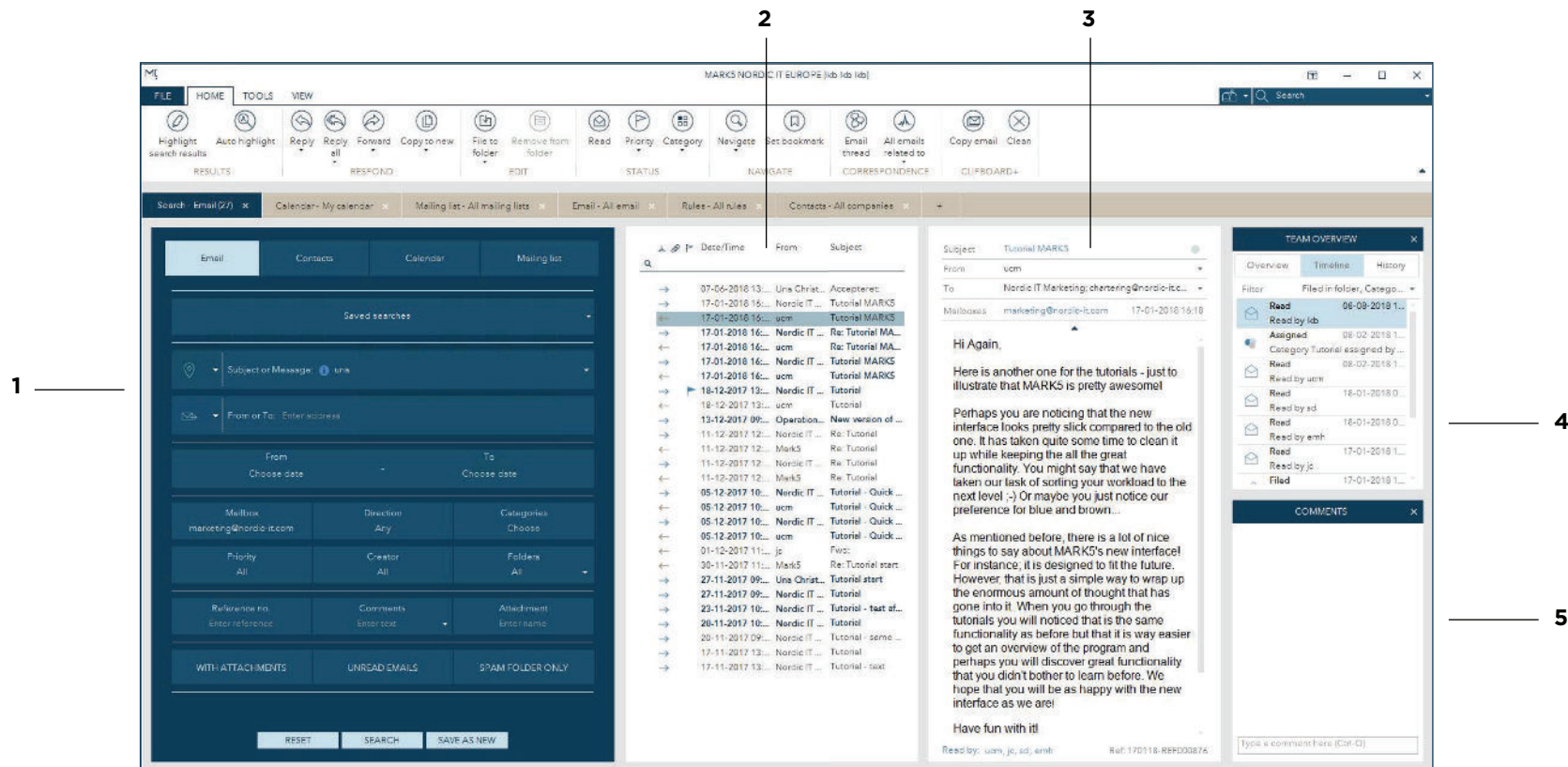
1 | You can use [quick search](#) in the Toolbar, regardless of whether you are in email, contacts, calendar or mailing list

2 | You can open a [search](#) through the [tab menu](#).

The following chapter will first introduce the basic navigation and work area in [search](#) from the tab menu and then explain [quick search](#) in the toolbar.



3.1 | Search overview



In search, you can make advanced and specific searches and save and store them for later use.

1 | The [search panel](#) is where you can generate a precise search in either email, contacts, calendar or mailing list.

2 | [Search list](#) is where your search results appear after you enter criteria and press search.

3 | [Preview](#) is where you will see the content of the chosen element from the search list.

4 | [Team overview](#)

When you click on an email, related actions will show in Team Overview. Here you keep track of what team members have done on a specific email. It will only appear, if you enable [team overview](#) in the [view](#) tab in the [toolbar](#).

5 | [Comments](#) is where you comment on emails and see if team members have left a comment.

3.2 | Search panel

The screenshot shows a search panel with the following components:

- 1** | Tab menu: A horizontal bar at the top with four tabs: "Email" (selected), "Contacts", "Calendar", and "Mailing list".
- 2** | Saved searches: A dropdown menu labeled "Saved searches" with a downward arrow.
- 3** | Search criteria: Two rows of search criteria. The first row has a location icon dropdown and a text field labeled "Subject or Message:". The second row has an envelope icon dropdown and a text field labeled "From or To: Enter address".
- 4** | Advanced filters: A section with multiple filter rows. Each row has a label and a value. The filters include: Mailbox (All), Direction (Any), Categories (Choose), Priority (All), Creator (All), Folders (All), Reference no. (Enter reference), Comments (Enter text), and Attachment (Enter name).

At the bottom of the panel, there are three buttons: "RESET", "SEARCH", and "SAVE AS NEW".

1 | **Tab menu** is where you choose to search in either **emails, contacts, calendar or mailing lists**.

2 | **Saved searches** is where you find your saved searches. Click the dropdown to the right and click the one you want to insert it into the search panel.

3 | Here you can search through all text. Use the dropdown to choose where to search (**subject, message or both**), then simply type in what you want to search for. The dropdown arrow on the right side allows you to select how to search according to the typed word.

4 | Here you can search through content related to specific email addresses. Use the left dropdown to choose who the email is either **from, sent to or both**. Now, type the email address in the text field.

The screenshot shows a search interface with the following elements:

- 5**: Points to the "From" and "To" date selection fields, each with a "Choose date" button.
- 6**: Points to the "Mailbox" field, which has a dropdown menu showing "All".
- 7**: Points to the "Direction" field, which has a dropdown menu showing "Any".
- 8**: Points to the "Reference no." field, which has a dropdown menu showing "Enter reference".
- 9**: Points to the "WITH ATTACHMENTS", "UNREAD EMAILS", and "SPAM FOLDER ONLY" filter buttons.
- 10**: Points to the "RESET", "SEARCH", and "SAVE AS NEW" action buttons at the bottom.

5 | Search through a specific period of time. A calendar will open where you can select [start](#) and [end dates](#) for the wanted search.

6 | In these fields you can select specific [mailboxes](#), [direction](#) and/or [categories](#). Just tap the field of interest and you will be able to choose from the dropdown that appears.

7 | In these fields you can select a specific [priority](#), [creator](#) and/or [folders](#). Just tap the field of interest and you will be able to choose from the dropdown that appears.

8 | In these fields, enter text to search for a specific [reference number](#), a [comment](#) or an [attachment](#).

9 | The last row is clickable and you can enable and disable the following options: If you want to search with [attachments](#), search only through [unread emails](#) and/or search through [spam folder only](#).

10 | The buttons allow you to [reset](#) your search panel, to run the [search](#) or to [save](#) the search criteria you have entered.

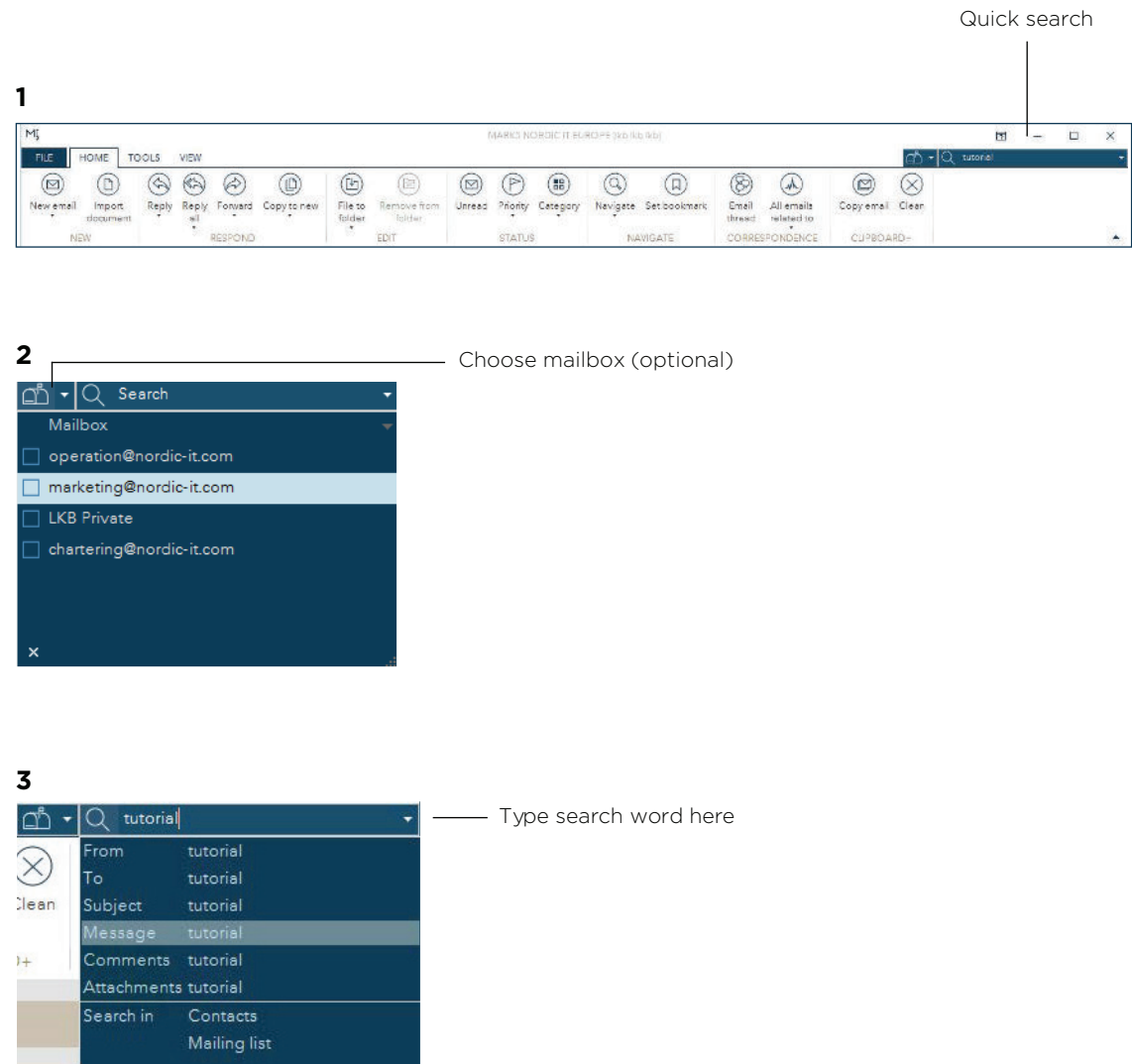
3.3 | Quick search

You can use quick search for simple searches.

1 | You can use **quick search** in the toolbar, regardless of whether you are in email, contacts, calendar or mailing list

2 | You can limit the search to a specific mailbox if you want. Tap the icon and choose one or more from the dropdown.

3 | Type in your search word next to the search icon. You can make a more accurate search by choosing a specific place to search from the dropdown. When you are done, press enter, and your results will show in a new tab.





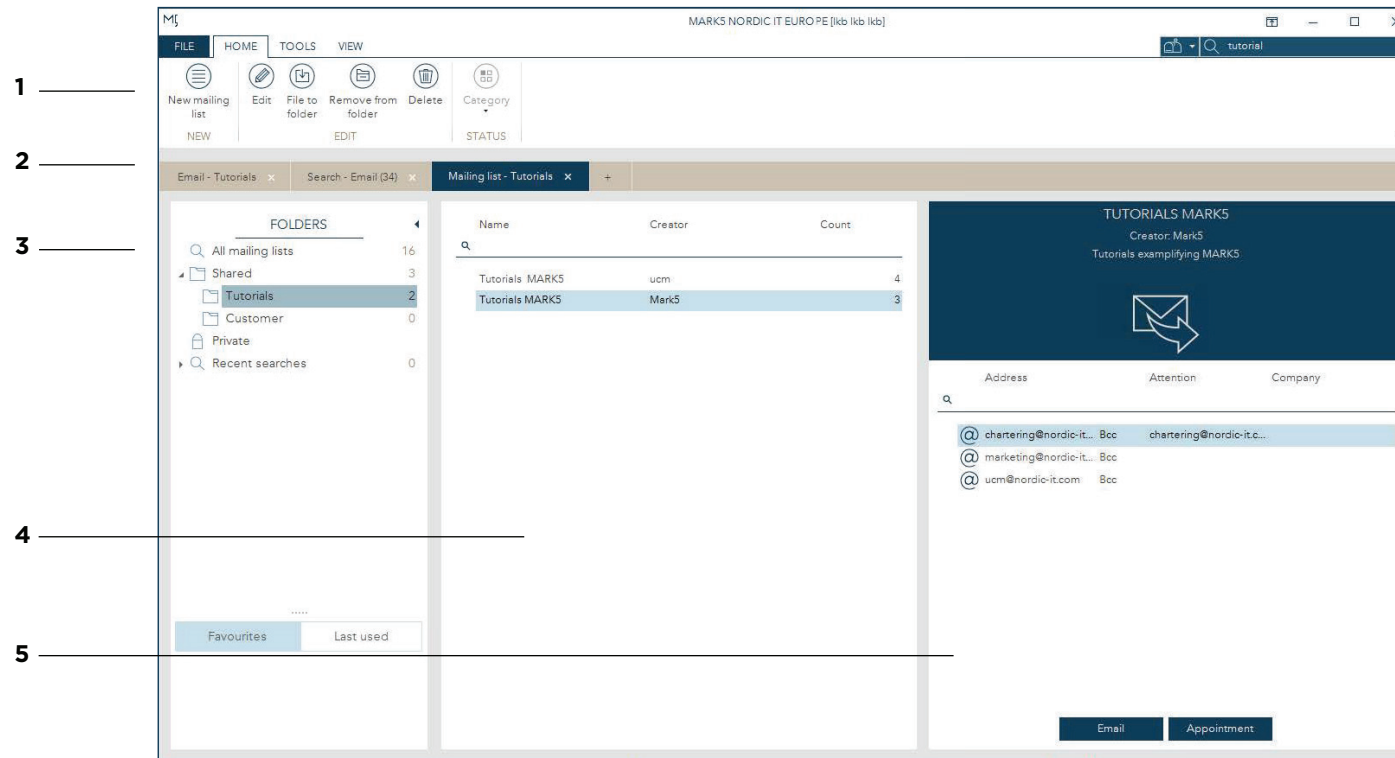
4.0 | Mailing Lists

The following chapter will introduce the basic navigation and work area in mailing lists.

In mailing list, you find your collection of mailing lists created from existing contacts. If you create mailing lists it becomes easier to send emails to many recipients in an efficient way.

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4.1 | Mailing list overview



1 | **Toolbar** is where you choose and use specific functions. The toolbar is sectioned in three tabs consisting of relevant functions; **home**, **tools** and **view**. In **home** you find the most used mailing list features. In **tools** you find less used features. In **view** you find layout related features.

2 | **Tab menu** is just below the toolbar. Click on the plus to create new tabs of content such as email, contacts, calendar, mailing lists and search.

3 | In **folders** you can choose to view all **mailing lists**, **shared** and **private**.

4 & 5 | **Mailing list view** When you choose a specific folder, the content of the list will show in the middle left pane. Now, choose a mailing list and you will see the content of the list in the next pane. You can send emails and create appointments to the active mailing list directly from the mailing list view.

5.0 | Short keys

CTRL-KEYS

CTRL + I	Messages
CTRL + M	New message
CTRL + F	Find a specific word within an email
CTRL + O	Add a comment to an email
CTRL + P	Print
CTRL + Q	File to folder
CTRL + R	View permissions
CTRL + S	Email delivery status
CTRL + T	Edit template(s)
CTRL + W	Copy email to own to-do list
CTRL + Y	Copy email to user to-do list
CTRL + Arrow up/down	Scroll up and down within an email
CTRL + Space	Mark email as read or unread
CTRL + Home	Jump to latest email received
CTRL + Page up/down	Jump between several emails
CTRL + End	Jump to the very first email received
CTRL + Shift + Up/down	Move folder up/down

F-KEYS

F2	Create new email
Alt + F2	Insert document
F3 + F4	Scroll between emails
F5	Edit/send email
F6	Reply email
Alt + F6	Reply all
F7	Forward email
F8	Search

OTHER SHORTKEYS









Alt + C	Open category window
Alt + S	Search for folder
Alt + R	Refresh folder
CTRL + Tab	Tab between tabs

EDITOR SHORTKEYS





CTRL + A	Select all
CTRL + B	Bold
CTRL + C	Copy
CTRL + E	Center
CTRL + H	Replace
CTRL + I	Italic
CTRL + L	Align left
CTRL + O	Open a file
CTRL + R	Align right
CTRL + T	Insert template
CTRL + U	Underline
CTRL + V	Paste
CTRL + X	Cut
CTRL + Z	Undo
CTRL + S	Save email

6.0 | Icon dictionary













A



-  Add criteria from mail
-  Align left
-  Align left & right
-  Align right
-  All email
-  Appointment
-  Attach
-  Attachment

B








-  Bold
-  Bookmark
-  Bullets
-  Bullets: Numbers

C





-  Category
-  Category assigned
-  Center
-  Change case
-  Clean
-  Clipboard+
-  Comment
-  Comments
-  Commercial advice
-  Company
-  Contract
-  Copy

-  Copy email
-  Copy to new










D

-  Deactivate
-  Delete
-  Delete
-  Delete from queue
-  Department
-  Document
-  Draft

E

-  Edit
-  Email
-  Emails related to
-  Emails thread

F



-  Filed in folder
-  Filed in to-do-list
-  File to folder
-  Find panel
-  Fixture
-  Folder
-  Font color
-  Format painter
-  Forward

-  Forwarded








G

-  Generate report





H

-  Horizontal view
-  Highlight color




I

-  Import
-  Import document
-  Increase indent
-  Insert contact report
-  Insert mail merge
-  Insert reference no.
-  Italic








L

-  Linked
-  Link emails
-  Load default layout
-  Locked



M

-  Mail merge preview
-  Match email to filter
-  Messages









N

-  Navigate
-  New/create/add
-  New company
-  New email
-  New mailing list
-  New person
-  New Rule

O

-  Open
-  Out off office

P













-  Paragraph properties
-  Permissions
-  Person
-  Position
-  Print
-  Priority
-  Private folder
-  Purchase request

Q














-  Queued

R















-  Read
-  Read

-  Received
-  Recycle bin
-  Referenced
-  Remove chevron
-  Remove formatting
-  Remove from folder
-  Replied
-  Reply
-  Reply all
-  Resend
-  Reset layout
-  Rule






S

-  Save
-  Search folder
-  Send
-  Send status
-  Settings
-  Smart folder
-  Spam
-  Spell check
-  Spell find
-  Spell option
-  Strikeout
-  Superscript
-  Superscript

T

-  Table
-  Table: Autofit
-  Table: Borders
-  Table: Delete
-  Table: Insert
-  Table: Merge cells
-  Table: Split cells
-  Table: Split table
-  Table style
-  Task
-  Team overview
-  Templates
-  Templates
-  To-do-list

U

-  Underline
-  Unlock
-  Unread
-  Update
-  Update mailing list

V

-  Valuation