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VERSION 7.0 USER GUIDE

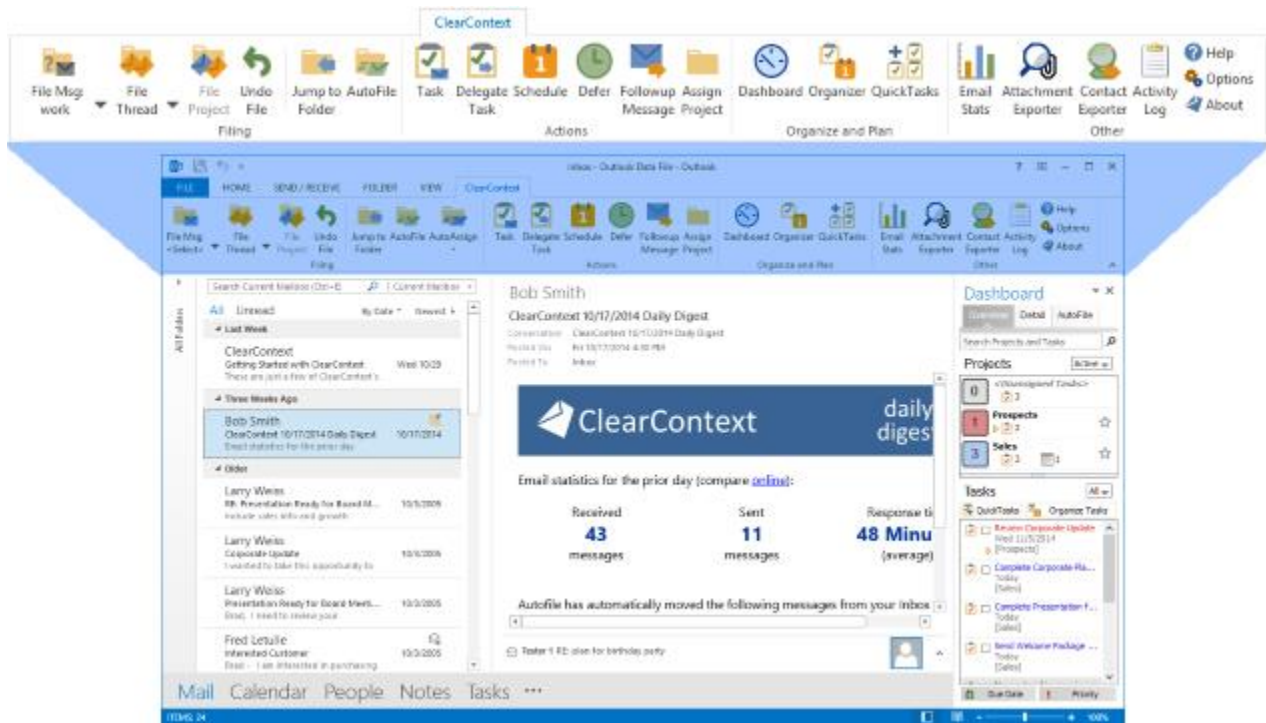
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## FEATURES OVERVIEW

Following installation you will note that ClearContext has added toolbars and a sidebar within Outlook. These features allow you to quickly & effectively manage your email, tasks and Projects. For a quick introduction to ClearContext, we recommend stepping through our [getting started page](#).



### THE CLEARCONTEXT INBOX

Immediately following setup, ClearContext has automatically filed your bulk email and analyzed your email history to provide relevant filing suggestions. Key features include:

**One-click filing** - ClearContext Pro suggests folders for filing based on email history. Press the *file* button to accept the suggestion or the arrow next to it to see more suggestions.

**Convert email to action** - When using ClearContext Pro, create a *Task* or *Appointment* from an email with a single click. Assign projects to them and view your work by project in the *Dashboard*.

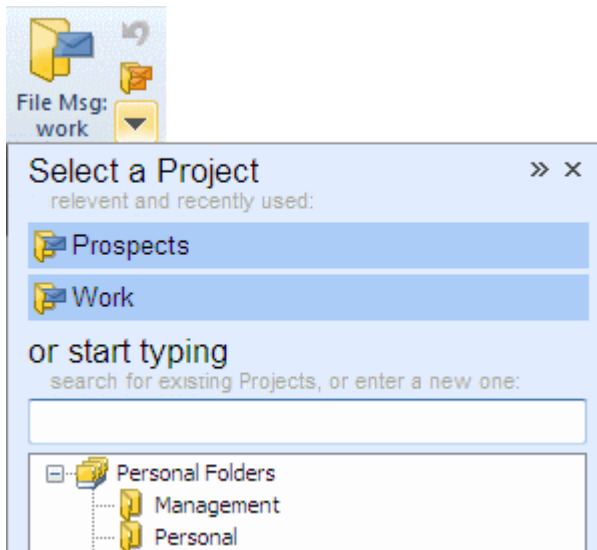
**Schedule your email** - Use *Defer* to snooze email out of your Inbox for later, *Followup* reminds you if you haven't received a response to emails you have sent

**AutoFile** - ClearContext Pro has a built in library of filing rules that automatically move bulk email out of your Inbox and provide a daily digest summary of those emails. Click the AutoFile button to create your own filing rules, or view the AutoFile tab in the Dashboard to review filed messages and edit filing settings.

In addition, you will find that ClearContext has installed toolbars in the Inbox and open item windows to provide greater control over email processing. This user guide will help you take advantage of these features. If you are implementing GTD in Outlook, see our [GTD setup guide](#) for additional reference.

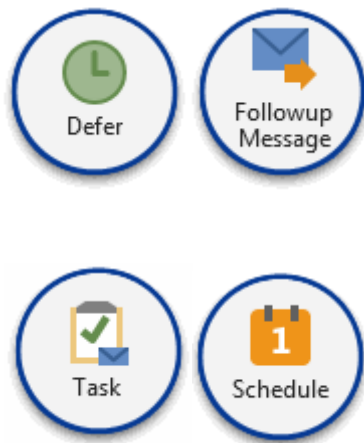
## GETTING STARTED WITH CLEARCONTEXT PRO

With ClearContext Professional, you're just minutes away from automatically keeping all your email, tasks, and projects organized using the folders and filing system you already use! These 4 simple steps will get you started – ClearContext will take care of the rest!



### 1. FILE MESSAGES TO SUGGESTED FOLDERS

ClearContext automatically suggests the right folders to file messages to based on your past email. Click **File Msg** to file to that folder or the down arrow ▼ to see more suggestions.

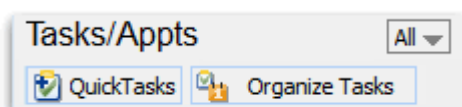


### 2. DEFER AND FOLLOWUP EMAILS

Click the Defer button to snooze email out of your Inbox for later or the Followup button to remind yourself if a response hasn't been received on a message.

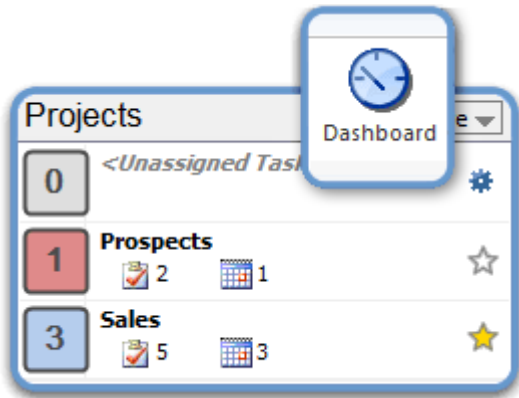
### 3. CREATE TASKS AND APPOINTMENTS

Click **Task** and **Schedule** on the ClearContext toolbar to turn email into tasks or appointments. If you haven't assigned a project to the email already, ClearContext will prompt you to select one.



### 4. CREATE AND ORGANIZE TASKS

Use the **QuickTasks** feature to quickly create tasks throughout the day. Click **Organize Tasks** in the Dashboard to easily organize all your tasks. Multiple tasks can be selected to change their due dates, Project and Categories.



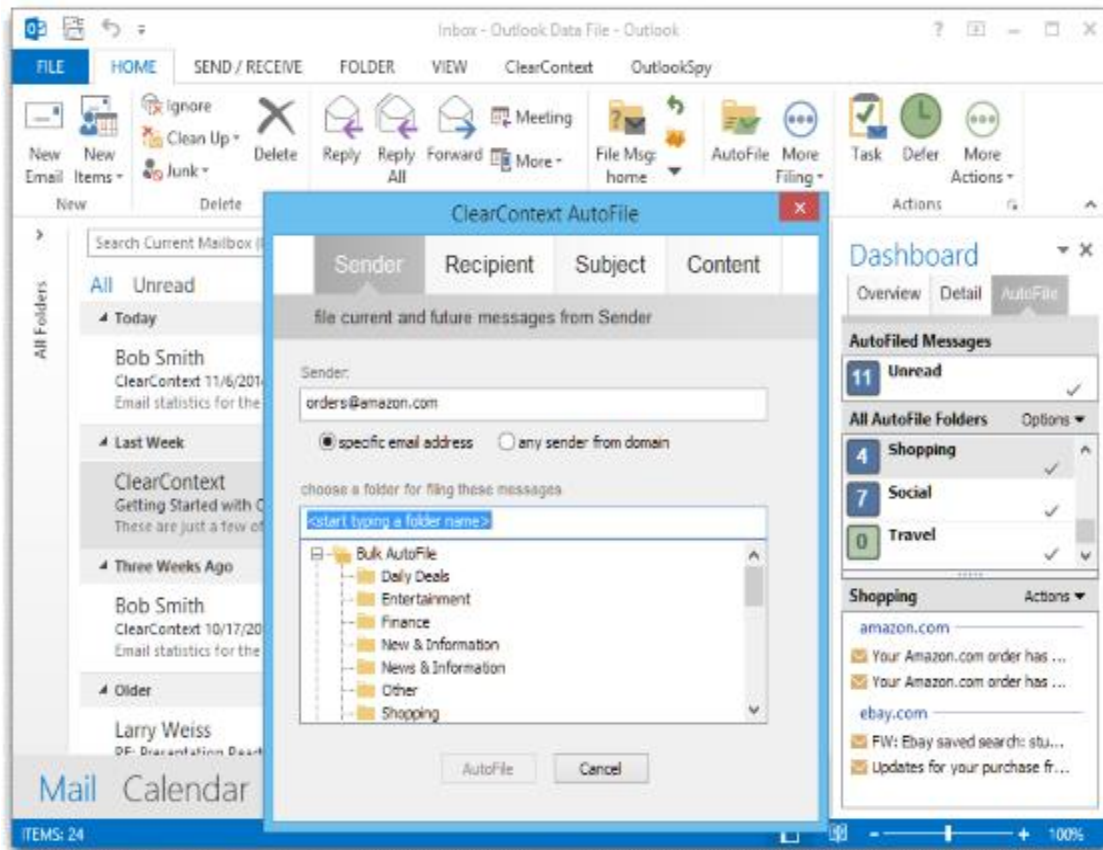
#### 5. VIEW YOUR PROJECTS

Now go to the ClearContext Dashboard sidebar in your inbox. Select Active Projects to see a summary of your projects and upcoming tasks/appointments. Click on a project name to switch to the Project Dashboard for detailed project information.

## FILING

## AUTOFILE: AUTOMATICALLY FILE AUTOMATED EMAIL

AutoFile automatically moves incoming "[graymail](#)" messages - including newsletters, social networking notifications, shopping email, etc. - to categorized folders. AutoFile comes pre-configured with filing rules for common automated email and is updated over time. You can also create your own AutoFile rules.

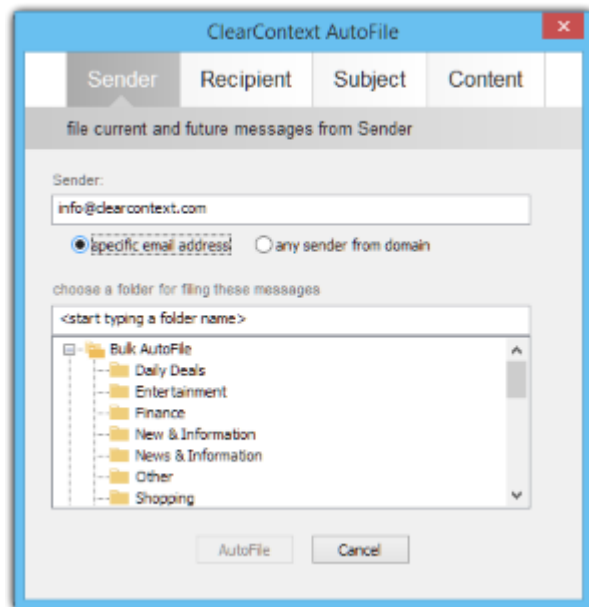




## AUTOFILE RULES

AutoFile comes pre-configured with filing rules for common senders of automated email. These rules are updated over time as ClearContext users identify new senders. Create your own custom AutoFile rules in one of two ways:

- Highlight a message and press the AutoFile button on the toolbar or select AutoFile from the ClearContext menu. In the dialog that appears, choose the type of rule to create such as Sender or Subject, rule options such as a specific email (i.e. bulk@bulksender.net) or a domain (i.e. bulksender.net) then select the folder you would like to file to. All messages in the current folder that match your rule will be filed to the AutoFile Folder you selected. All future messages from that sender or domain will be filed as well.
- Click and drag a message onto a filing folder in the Sidebar to create your rule. As above, all current and future messages from this sender or domain will be moved to the AutoFile Folder.
- The built in ClearContext AutoFile rules always file to the folders under ClearContext AutoFiled folders. Your custom rules can file to these AutoFile folders or any other filing folder you use with ClearContext.



See below for AutoFile rule configuration options.

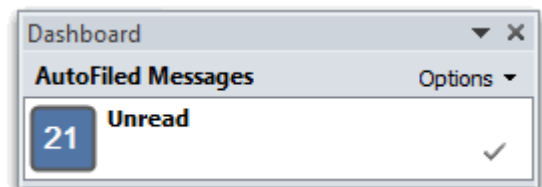
## AUTOFILE SIDEBAR

The AutoFile tab on the ClearContext Sidebar provides a tool to view and manage these emails.

### *AutoFiled Messages*

The top section of the AutoFile tab shows a count of all unread messages across all AutoFile folders:

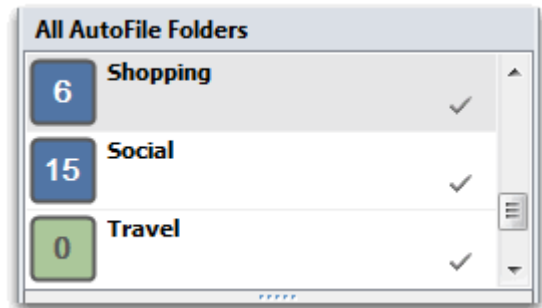
- Click on Unread to view all AutoFiled, unread messages.
- Toggle the Filing Folder view between All Folders and folders with Unread only via Options.
- Select *Options > Rules and Settings* to configure AutoFile.
- Select *Options > New Filing Folder* to create a custom filing folder for use with AutoFile.



### AutoFile Folders

Open the AutoFile tab on the ClearContext Dashboard to see an unread count of messages filed by folder (Shopping, Social, Travel, etc.) :

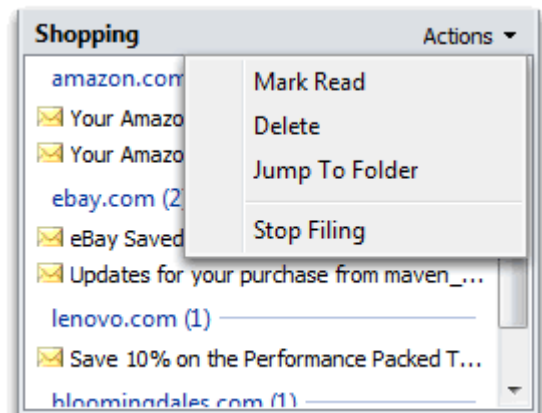
- Click on a filing folder to see unread, AutoFiled messages in that folder.
- Double-click a filing folder to open that folder.
- Click the check mark on the filing folder to mark all messages in the folder as read.
- Right click a folder to disable/enable filing to it. Open *View AutoFile Folder Rules* from the right click menu to manage the filing rules for the folder.



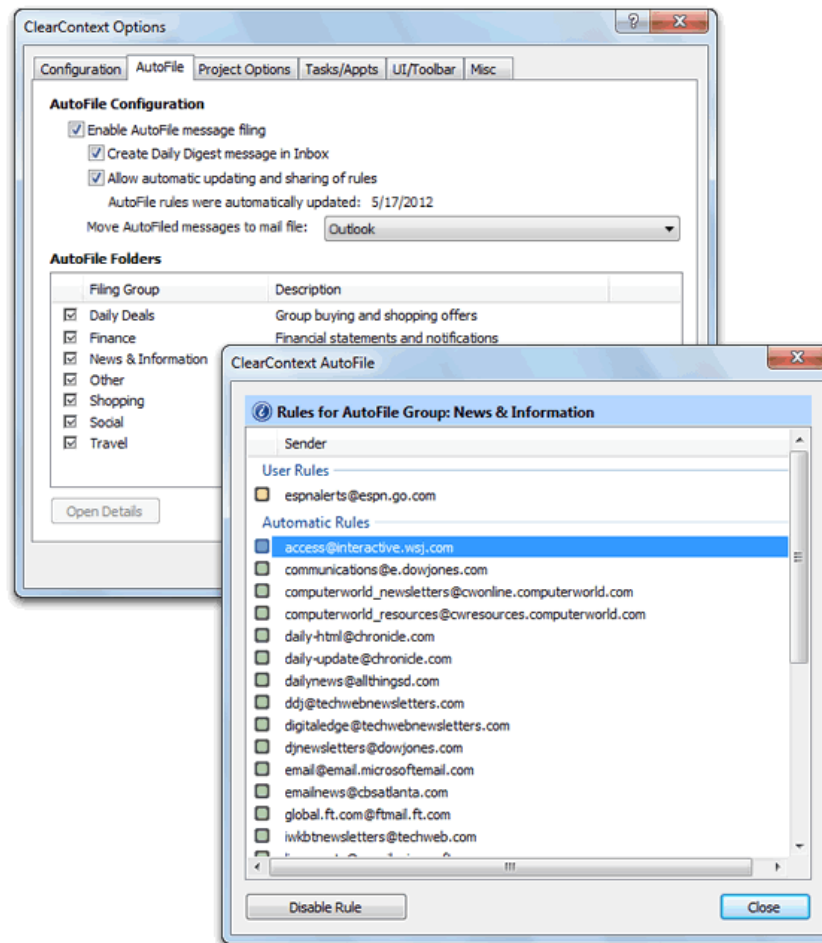
### Unread Messages

The message list at the bottom of AutoFile tab shows all unread email for the chosen folder. Messages are grouped by sender. You can act on individual messages via the Actions or right-click menus:

- *Mark Read* messages that you no longer wish to see in the list.
- *Delete* messages that you do not want to keep.
- Select *Actions > Jump to Folder* to open the folder that contains the current message.
- Select *Stop Filing* for messages that you no longer want to AutoFile.



## AUTOFILE OPTIONS



Open *ClearContext* > *Options* > *AutoFile* to configure the service. The following options are available:

- *Enable AutoFile message filing* turns AutoFile on/off.
- *Create Daily Digest message in Inbox* directs ClearContext to place a summary of all AutoFiled messages in the Inbox once/day.
- Check *Allow automatic updating and sharing of rules* to periodically download new AutoFile rules for automated senders. When enabled, this will send the custom AutoFile rules that you create to ClearContext so that new bulk senders can be identified.
- *Move AutoFiled message to mail file*: select the mail file in which the AutoFile folders are located and where AutoFiled messages will be moved.

- Enable/Disable individual filing folders in the bottom half of the options dialog.
- Double-click a filing folder or highlight and click **Open Details** to see the rules designated for the selected folder. Turn off individual rules from this dialog.
- Highlight a filing folder and click **Change Name** to rename a filing folder.
- Press **Apply to Inbox** to apply all currently enabled AutoFile rules to your Inbox. This is especially useful after an AutoFile rule update.

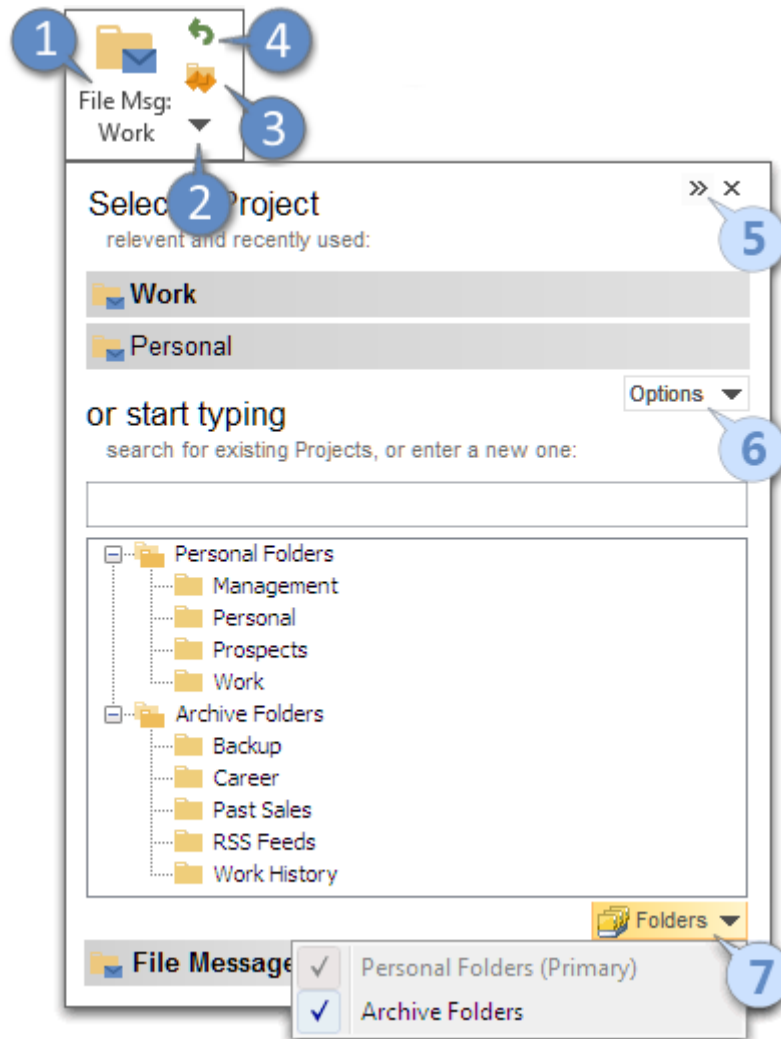
## DAILY DIGEST

The Daily Digest is sent to your Inbox once/day and lists all messages filed over the last 24 hours. Use this message to ensure that you don't miss an important AutoFiled email. Click on a filing folder to jump to the folder that contains the filed messages. The Daily Digest also provides some email usage and responsiveness statistics for the last 24 hours. Disable the Daily Digest via *ClearContext > Options > AutoFile*.





## AUTOMATED FILING: QUICKLY FILE TO SUGGESTED FOLDERS

ClearContext automates the filing process, making it easier to identify and store messages by remembering where you previously filed email.



### 1. FILE MSG FILES EMAIL TO THE LISTED FOLDER

 indicates that you previously filed messages in this conversation.  indicates that this is a suggested folder. *Shortcut Key: ALT-m*

### 2. PRESS TO SEE OTHER FILING CHOICES

▼ opens other choices in the Project selector. Select a recently used folder or start typing to filter the full folder list. Hide or add additional suggestions using the links in the selector. *Shortcut Key: CTRL-ALT-m*

### 3. *THREAD* FILES THE ENTIRE CONVERSATION

File all messages from this conversation thread into the folder listed on the File Msg button. Press ▼ to see other choices. *Shortcut Key: ALT-d*

### 4. *UNDO* THE LAST MESSAGE FILED

If you accidentally filed a message, Undo will return it to the current folder. *Shortcut Key: ALT-u*

#### \* *FILE PROJECT* FILES ALL MESSAGES IN THE CURRENT PROJECT

Highlight a message with a Project assigned to it and select *File Project* from the ClearContext menu. All messages in the current folder with this Project assigned to it will be filed. This button can be added to the toolbar via Toolbar Management.



#### \* *JUMP TO FOLDER* OPENS A PROJECT FOLDER

Select *Jump to Folder* from the ClearContext menu to quickly open a folder. This button can be added to the toolbar as well.



## OPTIONS

### 5. *EXPAND THE PROJECT SELECTOR*

Press the right arrow to expand the selector and see suggestions in two columns.

### 6. *CHANGE THE NUMBER OF SUGGESTIONS OR EDIT SUGGESTIONS DISPLAYED*

Click Options to configure the number of suggestions shown in the selector. If there is a suggestion listed that you would no longer like to be displayed, select Edit Suggestions.

## 7. ADD/REMOVE AVAILABLE MAIL FILES

Click *Folders* to add or remove available mail files. Go to *ClearContext > Options > Configuration* to add Public Folders and SharePoint Lists. Designate a Personal Folders file as your primary here as well. If all of your folders reside under a single folder (i.e. sub-folders of the Inbox) designate the **Root folder for Filing and Projects** here (i.e. */Inbox*).

### \* ONE-CLICK FILING

When you disable one-click filing via *ClearContext > Options > UI/Toolbar*, ClearContext only shows a project in the **File Msg** button when previous messages in that conversation have been filed.

#### Filing

- ☒ Mark message(s) as read
- ☒ Show one click filing suggestions

### \* ASSIGN PROJECT

To assign a project without filing, select Assign Project from the ClearContext menu. You can also remove a project assignment with this button.



### \* WHEN MESSAGES ARE MOVED TO A PROJECT

By default, ClearContext monitors projects folders and assigns that project to email conversations when messages appear there. Configure this behavior at *ClearContext > Options > Projects Options*.



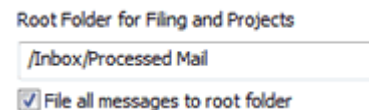
### \* CATEGORY SYNCHRONIZATION

By default, ClearContext writes the Project name to the message Category field with Brackets around it. Turn this on/off and change options in *Project Options*.



### \* SINGLE FOLDER FILING

To file all messages to a single folder instead of individual project folders, **select File all messages to root folder** in *Project Options*. When you press any Filing button, ClearContext will assign the Project Category to the message and move it to the folder you specify.



## PROJECT MANAGEMENT TIPS

*Multi-level Projects:* To create multi-level Projects, enter the project names separated by a "/". For example, "Work/Project" would store the message in the "Project" subfolder underneath the "Work" main folder.

*New Messages:* Assign a project to a new message via the project button on the open message prior to sending. All email responses to that message will automatically include the project name. In addition, if you are utilizing the Save Sent Messages option, this new message will automatically be filed in the appropriate project folder.

*Category Delimiters:* Change the Prefix and Suffix appended to Project names when duplicated in the category field via *ClearContext > Options > Project Options*. Leave these fields blank to remove the delimiters.

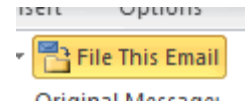


## AUTOMATICALLY FILE SENT MESSAGES

ClearContext can automatically file messages you send as well as the original message you are replying to or forwarding. These options are set in the toolbar as you compose your message:

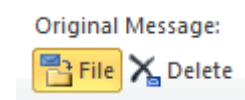
### \* FILE THIS EMAIL FILES THE MESSAGE YOU ARE SENDING

Enable *File This Email* when sending email. The message you are sending will be automatically filed to the Project folder assigned. ClearContext remembers this setting for future messages.



### \* FILE ORIGINAL OR DELETE ORIGINAL AS YOU REPLY OR FORWARD

Enable *File* under *Original Message* when replying. The message you are replying to will be automatically filed to the Project folder you assign. ClearContext remembers this setting for future messages.



*Delete* works the same way, deleting the message you are replying to. This setting is not remembered. See Options below to default to Delete.

## OPTIONS

### \* SAVE SENT MESSAGES

Press the right arrow to expand the selector and see suggestions in two columns.

### \* DELETE ORIGINAL MESSAGE IF NOT FILING

Enable ClearContext to delete all unassigned, non-Project messages as you reply.

### \* WHEN SENDING, ASK ABOUT PROJECT ASSIGNMENTS

Configure ClearContext to ask you about Project folder assignments when sending a message, if one is not already assigned.

#### Sent and Replied Messages

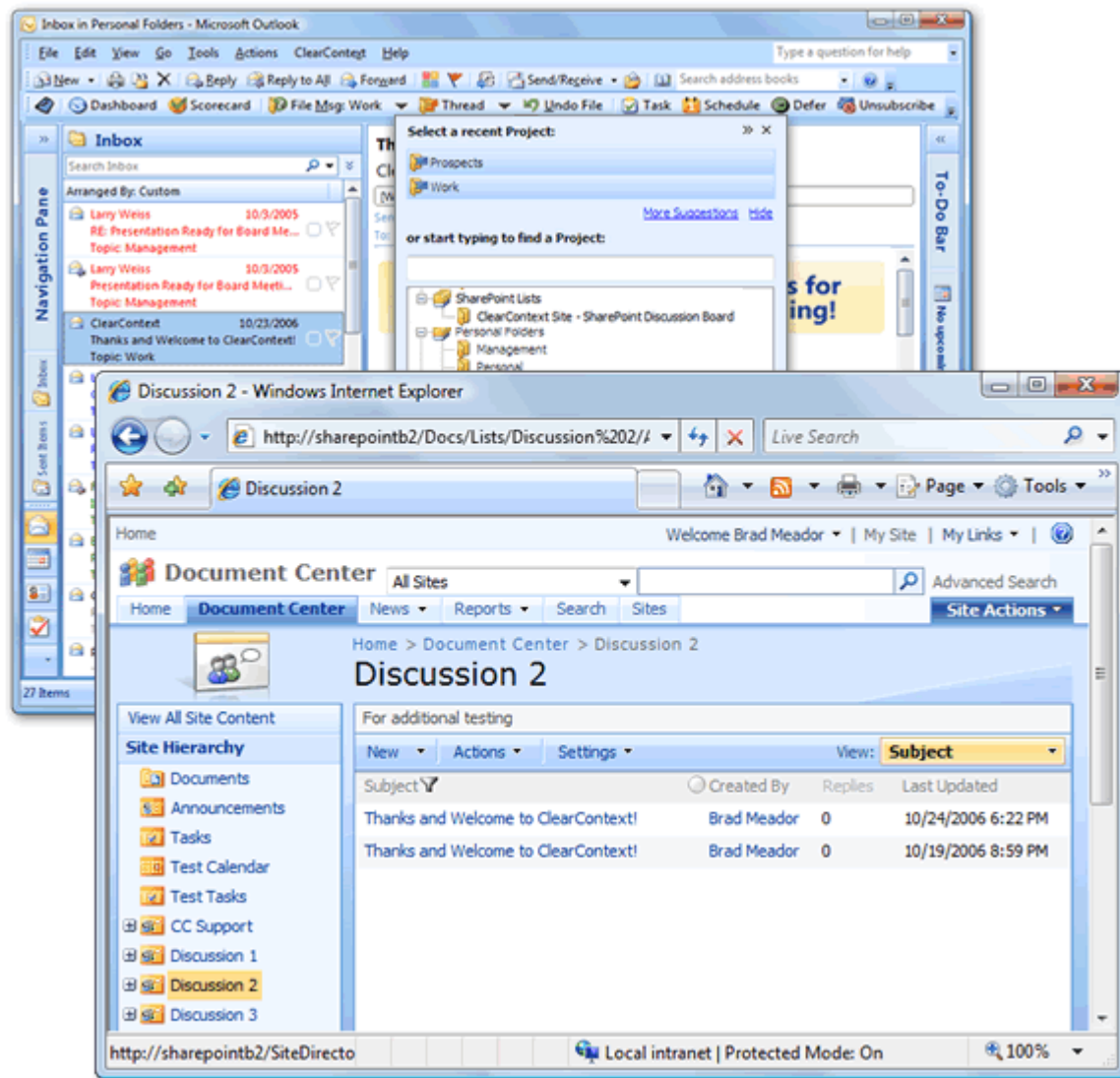
- ☒ Save sent messages to Project Folder
- ☐ Delete Original Message if not filing

When sending, ask about Project assignment:

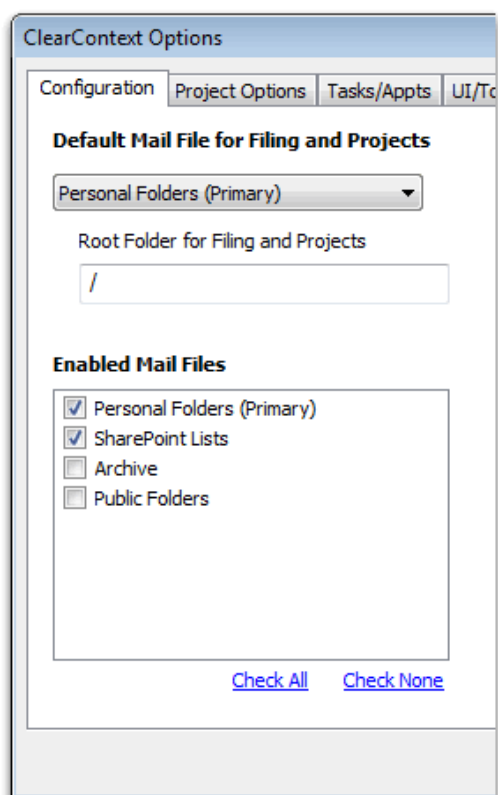
- ☒ As Needed
- ☐ Every Time
- ☐ Never

## SHARED FILING: EFFICIENTLY COLLABORATE WITH YOUR TEAM

ClearContext allows the designation of a secondary message store (such as SharePoint Lists in Outlook 2007 and greater, Public Folders, or an alternate Personal Folders file) as a secondary Project Folder repository for easing sharing of message conversations outside of the primary mail file.



Designate the secondary message store via the Configuration panel and ClearContext will automatically convert folders within the datastore to Projects. These shared Projects can then be assigned to message conversations and ClearContext's file buttons will automatically move messages to the alternate location.

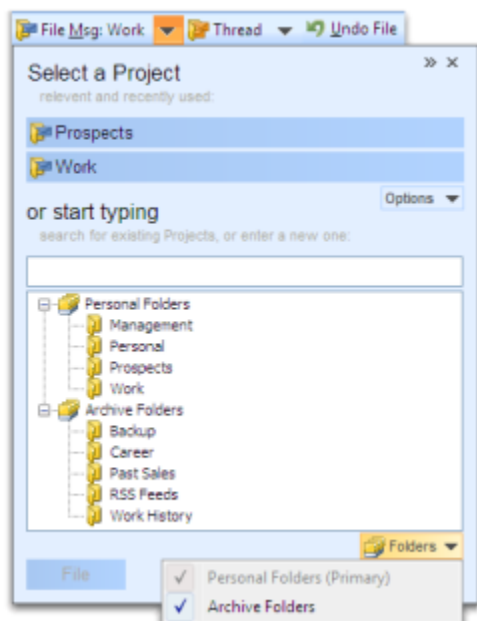


## CONFIGURING THE SECONDARY MESSAGE STORE

To designate an alternate message store, open the ClearContext Configuration menu at *ClearContext > Options > Configuration*. After a restart of Outlook, ClearContext automatically populates the Project list with folders in the data store.

Select *Public Folders* to share to Exchange Server public folders. ClearContext will convert all Mail and Post public folders into Projects, while ignoring folders of other types (Contacts, Tasks, etc.). (Please note that in some versions of Outlook, the name for the public folders data store is listed as *Microsoft Exchange Server*).

Select *SharePoint Lists* to instruct ClearContext to recognize SharePoint discussion lists that have been connected to Outlook 2007 and greater. To connect a SharePoint discussion, open the discussion site in a browser and select *Actions > Connect to Outlook*. This feature is not available in Outlook 2003 and earlier.



## FILING TO A SECONDARY MESSAGE STORE

After a secondary message store has been added via Configuration, shared folders automatically appear at the bottom of the Project list. Shared Project assignment and filing then works exactly like Project assignment using primary Projects; assign a shared Project and all current and future messages in the conversation will be assigned that shared Project. Use any of ClearContext's filing buttons to automatically move these messages into the shared message store.

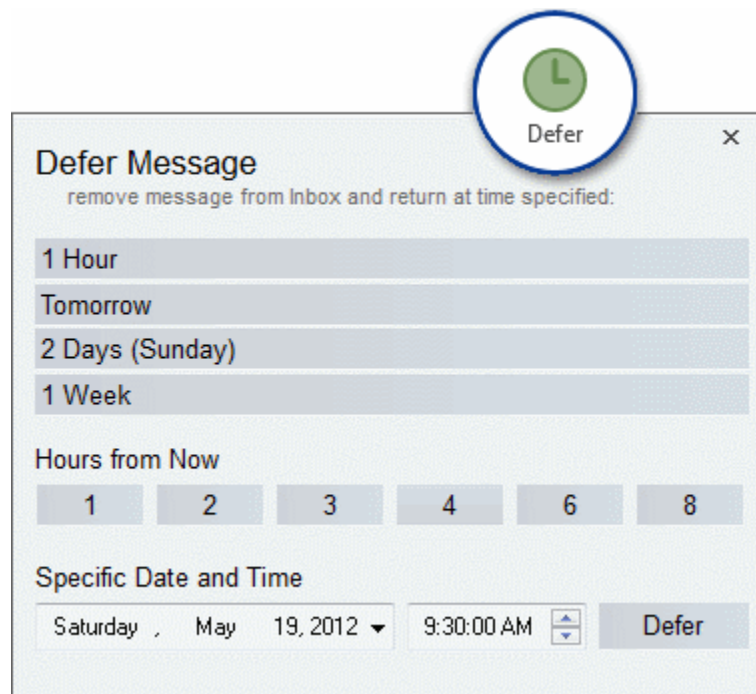
## ARCHIVE MAIL FILES

By default, ClearContext enables all open mail files as project folders. Remove archive folders from this list at *ClearContext > Options > Configuration* if you don't file to them.

## MESSAGE ACTIONS

### DEFER: HIDE INBOX MESSAGES UNTIL YOU ARE READY TO DEAL WITH THEM

Much like you can snooze tasks and appointments in Outlook, Defer allows you to snooze a message for a given duration. When you click *Defer*, ClearContext moves the message into a special, dated deferred folder and automatically pulls it back into the Inbox, unread, at the time of your choosing.




Highlight a message you want to postpone and click the *Defer* button. You can choose to defer for a period of time from now or choose a specific date and time. ClearContext will move the message into a dated ClearContext Deferred folder (a sub-folder of the Inbox). At the chosen time, the message will re-appear unread in the Inbox. Alternatively, click on one of the ClearContext Deferred dated folders to view upcoming messages. You can defer a message as many times as you want.

#### DEFER TIP

The Defer reminder time defaults to the task reminder time you have set in native Outlook (usually 8 AM). To change, go to *Tools > Options > Task Options* and change the reminder time in the Tasks subsection.

## FOLLOWUP: REMIND YOURSELF TO CHECK ON THE STATUS OF A MESSAGE

With *Followup Msg*, quickly and easily create automated reminders of important email responses that you are expecting.



**Followup Task**  
create a followup task that auto cancels if a reply is received:  
select a time period in which you expect a response.

Tomorrow  
2 Days (Sunday)  
1 Week  
2 Weeks

Hours from Now  
1 2 3 4 6 8

Specific Date  
Saturday , May 19, 2012 Followup

Hide Options ▲

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Reminder ☒ Enable 9:30:00 AM

Auto Cancel When I receive any response

Status Not Started

Category @waiting

As you send email, *Followup Msg* will create a task to remind you if you have not received a response in a designated amount of time. As you compose a message, click the *Followup Msg* button and select the time period for your reminder. Choose from the following completion options:

- Cancel the reminder task when you receive a new message in the conversation, regardless of sender

- Cancel the reminder task when you receive a new message in the conversation from a specific sender
- Never cancel the reminder task, regardless of whether you receive further correspondence in the conversation or not

When you send the message, a task with the message subject and the prefix "Followup:" will be created in your tasks list. It will pop-up to remind you of the follow-up at the time you chose.

To assign a specific status or category to the Followup task, assign Followup Initial Status as you create the follow up.

You can also create a Follow-Up task for any message conversation at any time by highlighting the message within Outlook and selecting *ClearContext > FollowUp Message* from the ClearContext menu.

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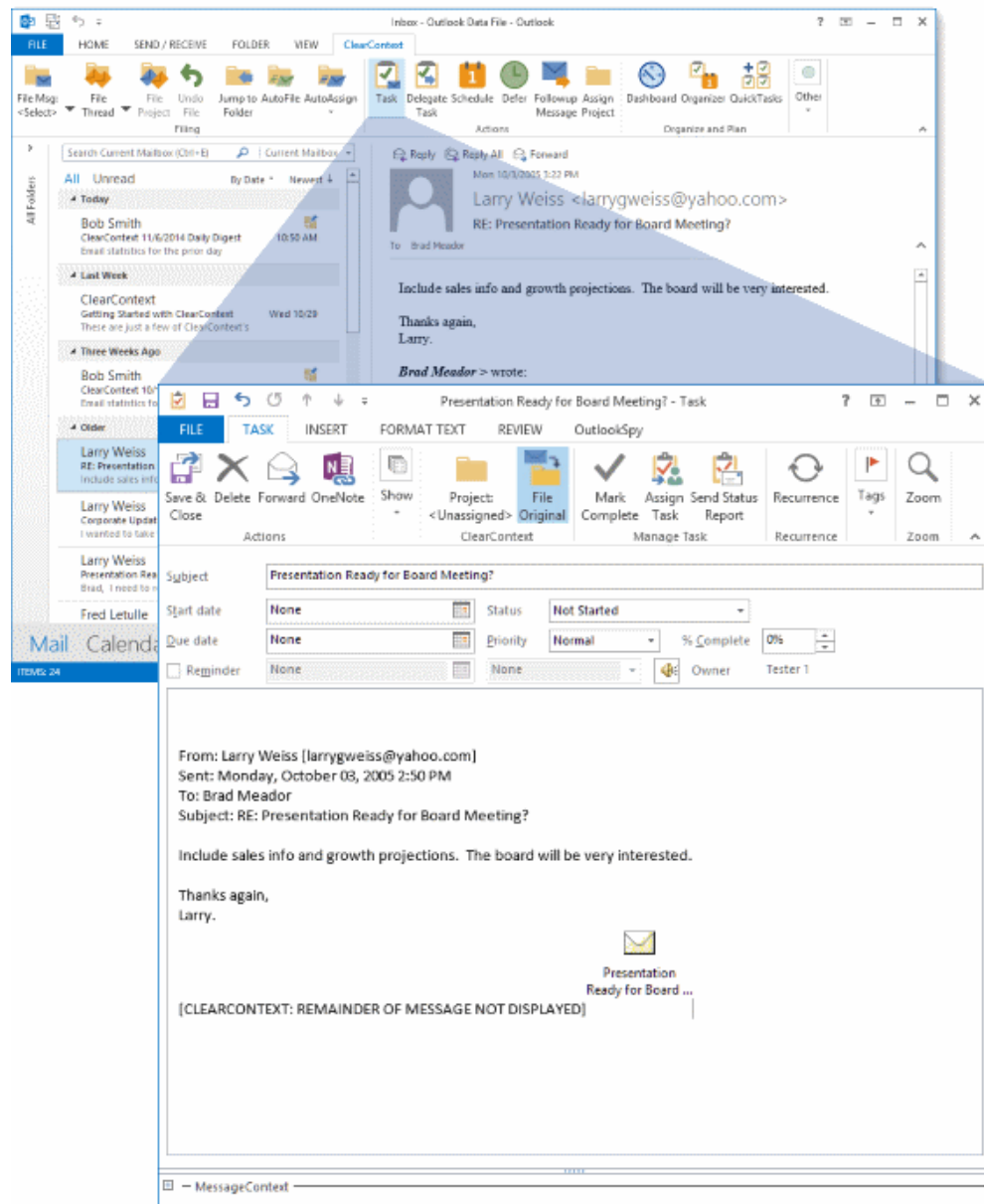
#### MULTIPLE ADDRESSES

Specify multiple addresses in the "Once I receive a response to this message conversation from a specific email address" field by separating them with a semi-colon. If you receive a response from any of the addresses in that field, the task will be automatically marked as complete.

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## TASKS: QUICKLY CREATE TO DO'S

The ClearContext Task button allows you to quickly add an email to your task list. Clicking *Task* will open a new Outlook task with the subject of the email and contents pasted into it and the original message attached. Set a due date and save to enter into your task list.

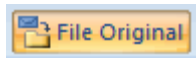


Once the task is created from a message, it is associated with the email conversation and will appear in the original conversation's MessageContext.

## PROJECT ASSIGNMENT

The Project field in a task is pre-populated with the original email's project. If one has not been assigned previously, ClearContext will query for a Project assignment when creating a task. This allows you to view this information by Project in the ClearContext Dashboard. Turn this feature on/off via **Project Assignment on New Tasks** at *ClearContext > Options > Tasks/Appts.*

## FILE ORIGINAL



When creating a task from an email, ClearContext can automatically file the original message, moving it out of the Inbox and saving the need to deal with it again. Enable File Original on the task toolbar and ClearContext will move the message you are creating the task from into the Project folder you select. ClearContext remembers this option the next time you create an appointment.

## TASK OPTIONS

By default, ClearContext truncates the text of long emails and attaches a copy of the message when copying creating an appointment or task. Turn these features on/off via the miscellaneous ClearContext Preference tab - *ClearContext > Options > Misc.*

The Summary and Detail Dashboards can be used to mark individual tasks as Next Actions. By default, this appends a category of !Next to the task. Change the category and category color assigned when using Mark Next Action at *ClearContext > Options > Tasks/Appts.*

## CUSTOM FORMS SUPPORT

If you would like to use a custom Outlook form for task generation when pressing the Task button, specify that form via *ClearContext > Options > Tasks/Appts.* Under **Create Tasks and Appointments with Custom Forms**, add the message class you wish to use. For example, *IPM.Task.MyTaskForm*.

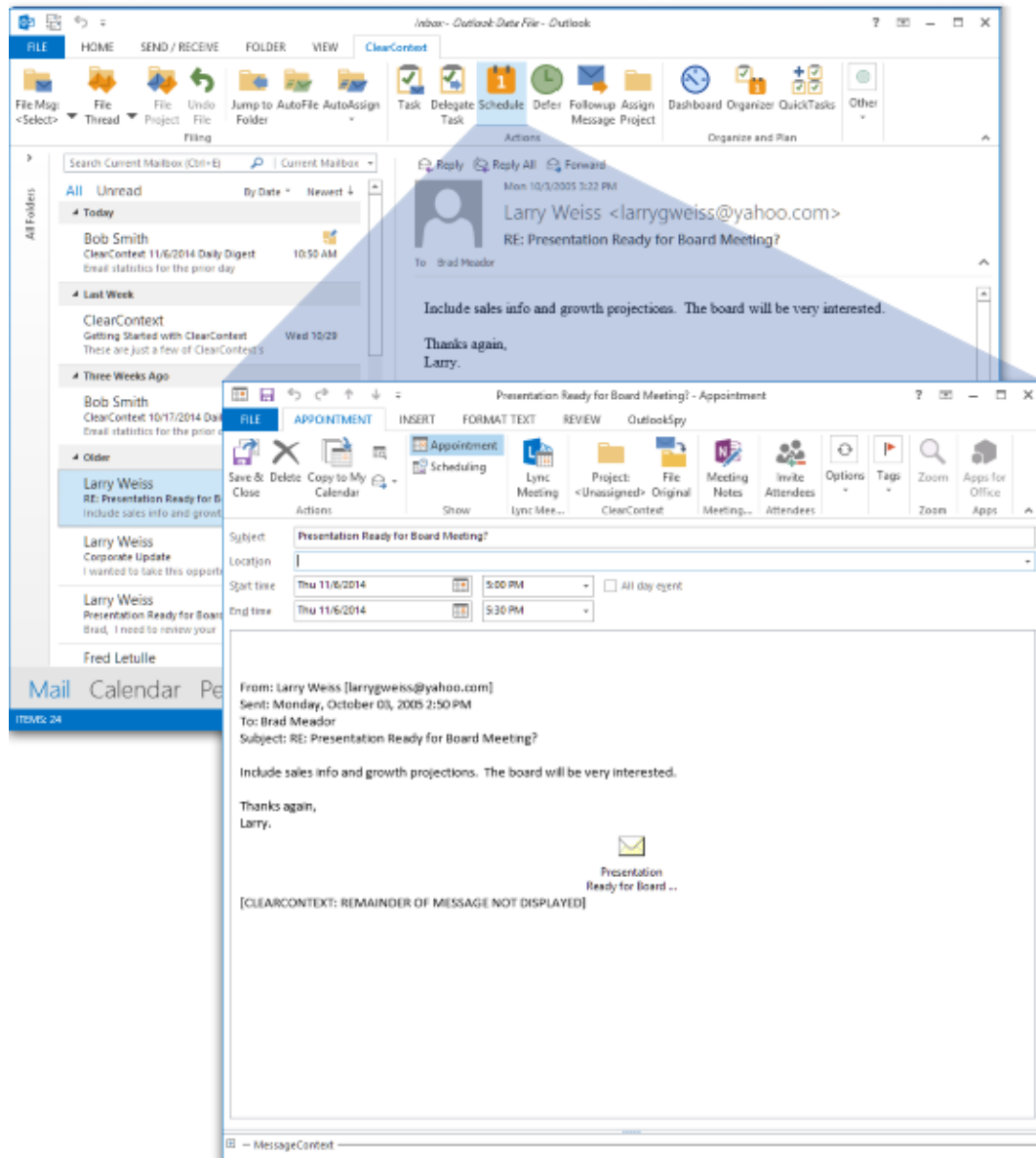
### CREATING A SINGLE TASK FROM MULTIPLE EMAILS

If you have several emails that you want to convert to a single task, select one of the messages and click the Task button. Before you save the task, drag the additional messages you want to associate with the task from the Inbox onto the task. They will be automatically attached to the item.



## APPOINTMENTS: QUICKLY MOVE EMAIL TO YOUR CALENDAR

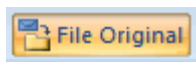
The *Schedule* button will automatically create appointments from email. Highlight an email, click Schedule, and the message contents will be pasted into a new appointment. Set the time and date for the appointment and click Save and Close. As in the creation of Tasks, you can set project and message processing options while you are creating the appointment and it will appear in the conversation's MessageContext.



## PROJECT ASSIGNMENT

ClearContext will query for a Project assignment when creating an appointment. This allows you to view this information by Project in the ClearContext Dashboard. Turn this feature on/off via **Project Assignment on New Appointments** at *ClearContext > Options > Tasks/Appts.*

## FILE ORIGINAL



When creating an appointment from an email, ClearContext can automatically file the original message, moving it out of the Inbox and saving the need to deal with it again.

Enable **File Original** on the appointment toolbar and ClearContext will move the message you are creating the appointment from into the Project folder you select. ClearContext remembers this option the next time you create an appointment.

## APPOINTMENT OPTIONS

By default, ClearContext truncates the text of long emails and attaches a copy of the message when copying creating an appointment or task. Turn these features on/off via the miscellaneous ClearContext Preference tab - *ClearContext > Options > Tasks/Appts.*

## CUSTOM FORMS SUPPORT

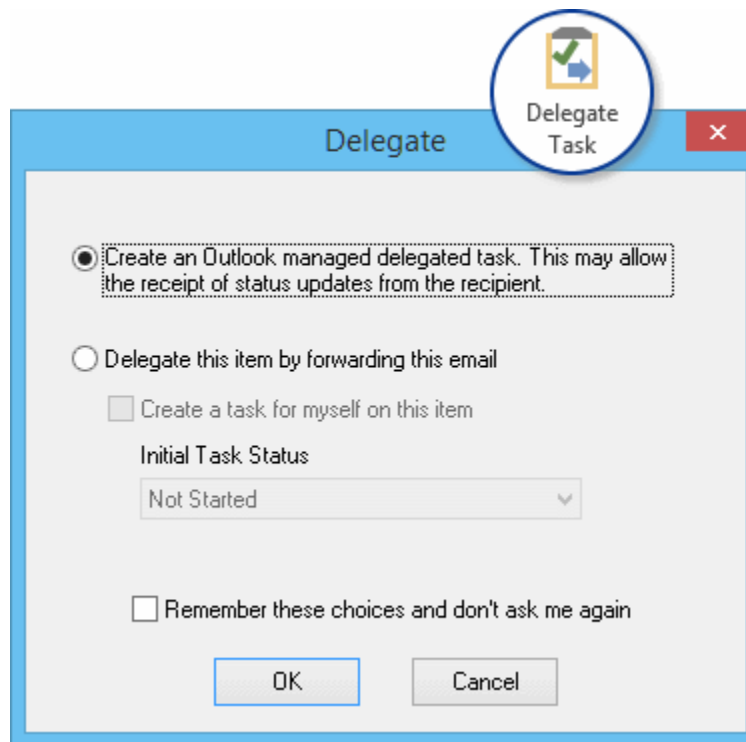
If you would like to use a custom Outlook form for task generation when pressing the Schedule button, specify that form via *ClearContext > Options > Tasks/Appts.* Under **Create Tasks and Appointments with Custom Forms**, add the message class you wish to use for Appointments. For example, *IPM.Appointments.MyApptForm*.

## RESPONDING TO ATTACHED EMAILS

In the creation of Tasks and Appointments, ClearContext attaches the original email to the item. If, while reviewing the task or appointment, you decide to respond to the original email, double-click the message attachment to open it and click *Reply*.

## DELEGATE: TRACK ASSIGNED TASKS

The Delegate function supports the quick assignment of emails to other individuals you are working with. Select the *Delegate* button from the ClearContext tab/menu or the ClearContext open message toolbar. The first time you select *Delegate* you will be presented with the options screen below.



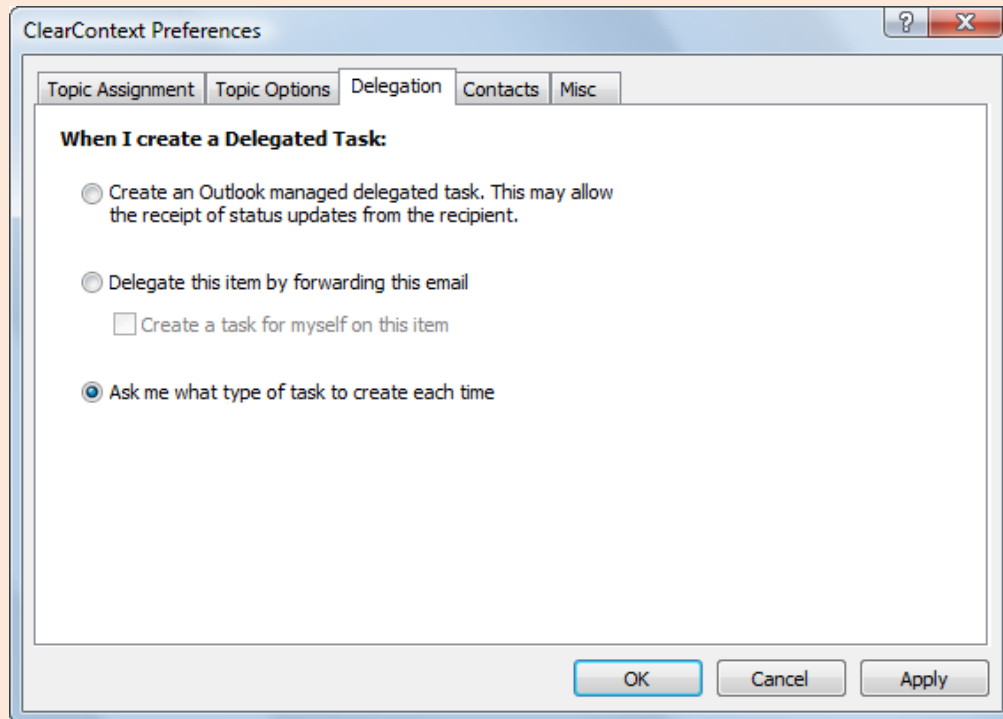
You have two options when delegating an email:

- **Create an Outlook Managed Delegated Task:** This creates an Outlook task with the contents of the email pasted into it and attaches the original email. Enter a recipient name in the To: field and click *Send* - the assigned task is sent to your delegate. A linked task is created in your task list as well. If the recipient is an Outlook user, he can choose to accept or decline the task and task status updates are communicated back to you.
- **Delegate this item by forwarding this email:** This option forwards the original email to your delegate and allows you to create a task in your task list to remind you of the assignment. Much like the ClearContext task button, the contents of the original email and an attachment are pasted into the task you create. Designate the initial status for the task (Waiting for someone else, In progress, etc.) from this dialog as well.

In both cases, use File Original in the task created to file the message you are delegating.

## REMEMBER THESE CHOICES

You can skip the Delegate options dialog in the future by checking "*Remember these choices and don't ask me again.*" If you change your mind, you can always alter the options from *ClearContext > Options > Tasks/Appts.*



## PLAN/ORGANIZE

### QUICKTASKS: QUICKLY ENTER AND MANAGE NEW TASKS

QuickTasks allow the easy entry of tasks in batches or individually throughout the day as you are working in Outlook or other applications. Quicktasks is launched from the button in the toolbar or the Dashboard. Once open, the QuickTasks window stays above other windows so that it is easily accessible.

QuickTasks

### Add New Tasks

Press <tab> to move to next field, <enter> to save, <esc> to exit

Subject  Date

Project  Category


*Recently Created*

[Vendor Review, No Date, \[Management\]](#)

[Send Welcome Package to Customer, 11/14/2014, \[Sales\]](#)

[Complete Presentation, 11/7/2014, \[Management\]](#)

[Review Corporate Update, 11/7/2014, \[Work\]](#)



\* QUICKTASKS IS OPTIMIZED TO QUICKLY CAPTURE BASIC TASK INFORMATION

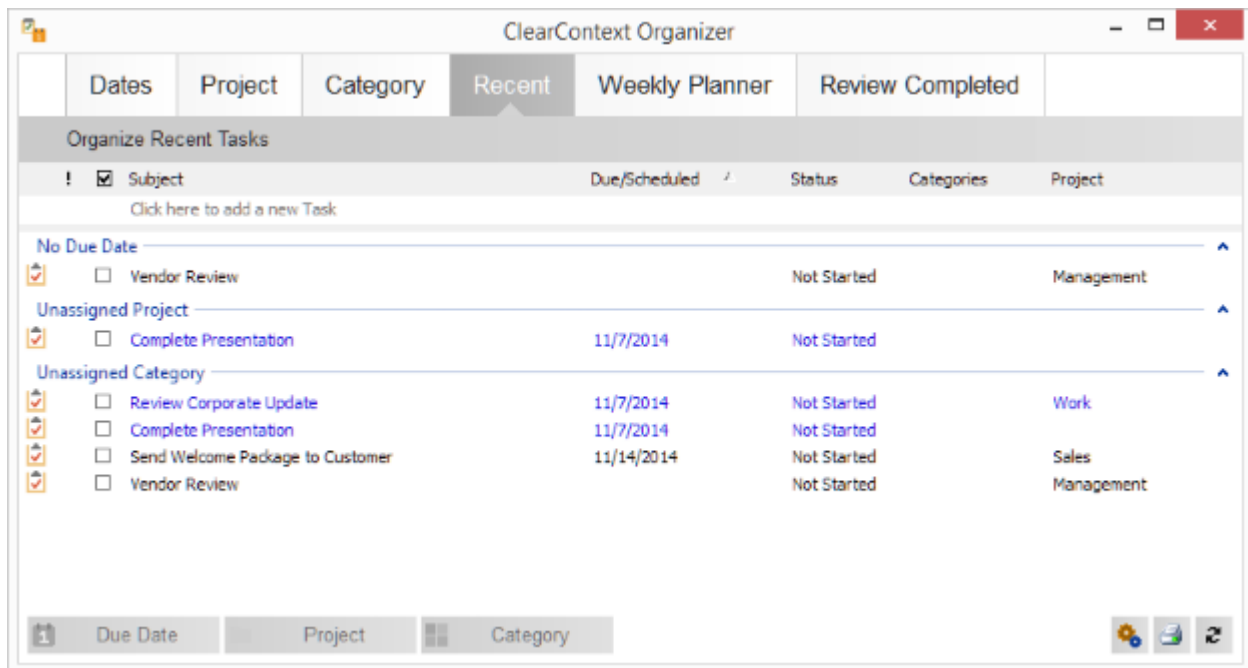
The only required field is the Subject field. The Date, Project and Category fields are optional and feature a quick selection interface to quickly find and select the information

\* REVIEW RECENTLY CREATED TASKS

Recently created tasks are shown in the lower portion of the QuickTasks window for easy reference. Clicking on the links opens the task details window to edit or view the task.

\* ORGANIZE RECENTLY CREATED TASKS

The Organize Recent Tasks button launches the Organizer in Recent Tasks mode. In this mode, recent tasks can be reviewed and organized with Due Dates, Projects and Categories. The Recent mode groups tasks in groups of tasks that do not have assigned Dates, Project or Categories to facilitate management of the recent tasks.



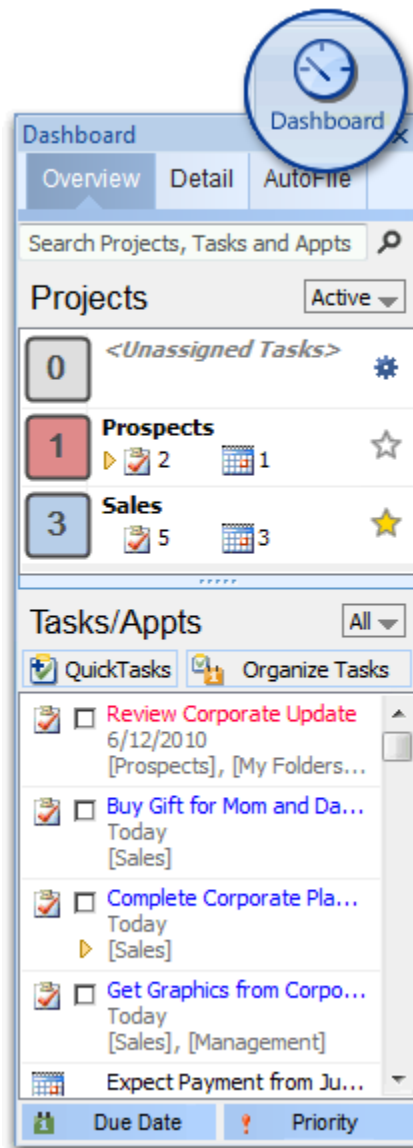
## TIPS

Use the <tab> key to move between fields, and the <enter> key to create a new task.

The Date field enters a Due Date or Start Date for the new task, depending on whether the Organizer is configured to manage Due or Start Dates.

## SUMMARY DASHBOARD: MANAGE PROJECTS IN OUTLOOK

Divided into three panes – Search, *Projects or Categories* and *Tasks/Appointments* - the **Summary Dashboard** provides a control panel for your workday. Use the Dashboard button on the main toolbar to open and close the Dashboard sidebar.



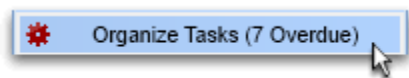
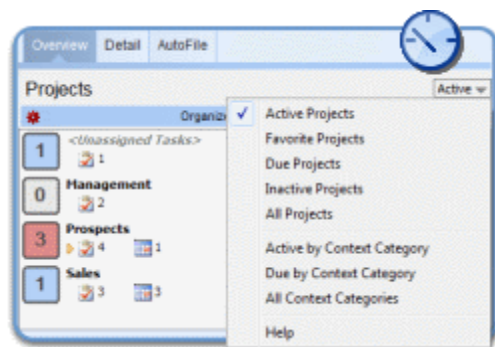
## PROJECTS OR CATEGORIES

Below the search field of the Dashboard, switch between Project and Context Category views of your tasks via the menu at the top right.

## PROJECTS

The Projects pane shows a summary of your Projects. Large status indicators to the left of each project give a count of due tasks.

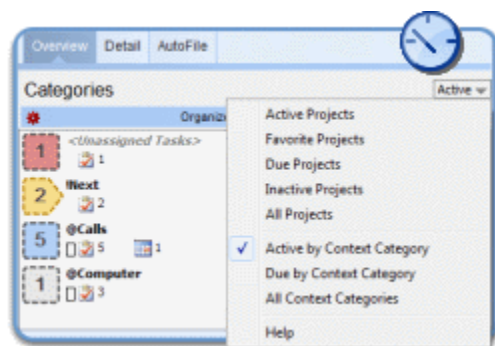
- The count to the left of each project indicates the number of overdue, due and in progress (start date of today or earlier) tasks for the project. The count is highlighted in blue if there are any tasks due today and red if there are any overdue tasks.
- Mark important or current Projects as a **Favorite** by pressing the star icon ☆ to the right of a project name.
- Use the view menu to filter your project list:
  - *Active by Project* shows projects with tasks assigned to them plus all favorite projects.
  - *Favorite Projects* displays only favorite projects.
  - *Due by Project* shows all projects with tasks that are due today or earlier.
  - *Inactive Projects* shows projects that have no tasks or appointments
  - *All Projects* opens a search box. Type a Project name in the filter to narrow the list of Projects down.
- A yellow small arrow to the left of the Task count indicates that a task in the Project has been marked as a Next Action.
- Double-click any Project in the list to drill down to a Detail Dashboard tab.
- Double-click **<Unassigned Tasks>** to open the ClearContext Organizer and view tasks without Project assignments.
- The **Organize Tasks** button shows a total count of overdue tasks. Click it to launch the ClearContext Organizer.



## CONTEXT CATEGORIES

Like the Project summary, the Context Category summary shows a summary of all of your *Contexts* - categories with a special character (@, !, etc.) in front of the name. Large status indicators to the left of each category give a count of due tasks.

- The count to the left of each Context Category indicates the number of overdue, due and in progress (start date of today or earlier) tasks for the category. The count is highlighted in blue if there are any tasks due today and red if there are any overdue tasks.



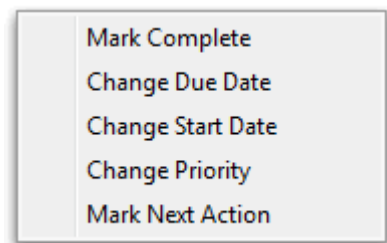


- The count to the left of the *!Next* category is highlighted in yellow and indicates the number of due and overdue tasks you have marked as Next Actions.
- Use the view menu to filter your project list:
  - *Active by Context Category* shows categories with tasks assigned to them.
  - *Due by Context Category* shows all categories with tasks that are due today or earlier.
  - *All Context Categories* opens a search box. Type a category name in the filter to narrow the list of categories down.
- Double-click any Context Category in the list to drill down to a Detail Dashboard tab.
- Double-click **<Unassigned Tasks>** to open the ClearContext Organizer and view tasks without Category assignments.

## TASKS/APPOINTMENTS

This pane lists all of your tasks and appointments. Quickly act on tasks from here:

- Check a task to mark it complete.
- Highlight multiple tasks to act on them at the same time.
- Use the Due Date button to reassign a due date to the currently selected tasks.
- Use the Priority button to elevate the priority of the currently selected tasks.
- Right click tasks to act from the context menu. You can Mark Complete, set the Start Date or Due Date, change the Priority and Mark Next Action from here.
- Double-click a task or appointment to open it.



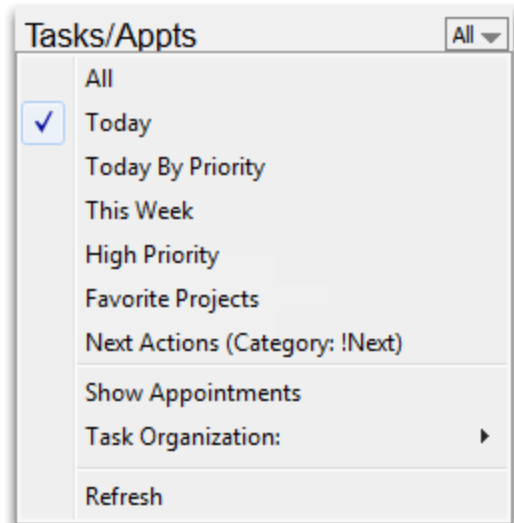
Tasks are formatted as follows:

- Tasks with a due date of today are highlighted in blue.
- Tasks with an overdue due date are highlighted in red.

- Tasks with a start date of today are underlined.
- Tasks designated as Next Actions have a small arrow to the left of the Subject.

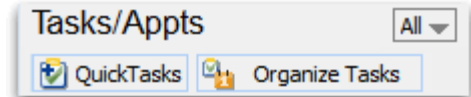
Filter the list from the view menu:

- See *All* tasks and appointments, items with a due date of *Today* or items with a due date *This Week*.
- *Today by Priority* shows all items due today, ordered by task priority.
- *Favorite Projects* displays items from projects that you have marked as a favorite in the Projects list.
- *Next Actions* shows only those tasks that have been designated as a Next Action. These tasks have a category of *!Next* assigned to them.
- Deselect *Show Appointments* to remove appointments from the list in this pane.
- Switch between organization by Due Date and organization by Start Date via the *Task Organization* menu. This will also switch the date button at the bottom of the panel between Due Date and Start Date.



Create and manage new tasks with *QuickTasks* and the *Organizer* at the top of the pane:

- Click the *QuickTasks* button to open the QuickTasks window for task entry
- Click the *Organize Tasks* button to open the Organizer window to manage tasks

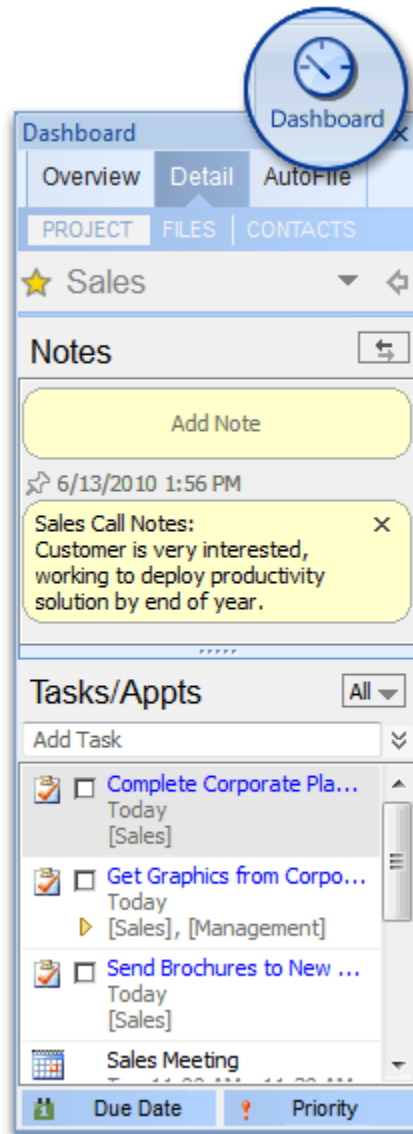


#### GET THE MOST OUT OF THE DASHBOARD

The Dashboard allows you to view all of your Outlook information by Project or Category. To take full advantage of this functionality, instruct ClearContext to query for Project assignment to Messages, Tasks and Appointments as you create them.

## DETAIL DASHBOARD: MANAGE PROJECTS AND CATEGORIES IN MICROSOFT OUTLOOK

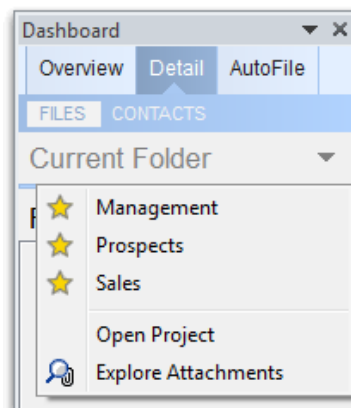
The **Detail Dashboard** displays all notes, tasks, appointments, contacts and attachments by Project or by Context Category.



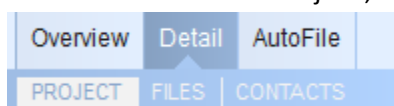
## PROJECTS

There are several ways to open a Project in the Detail Dashboard:

- Double-click a Project name in the Summary Dashboard.
- Navigate to a Project folder in Outlook and then click on the Detail tab in the sidebar.
- From the Detail tab, click on name of the current Project/Folder with the down arrow. From the menu that appears, select from a list of favorite projects or click Open Project to open the Project selector.



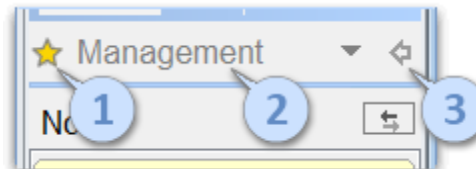
Once open, the Project Detail view is divided into three sections that can be navigated via the button bar underneath the tabs - Project, Files and Contacts.



### PROJECT SUMMARY

Add notes to the project and view all of your project-related tasks and appointments in the Project Summary. This section is available for Project folders, but is not present in non-Project folders (such as the Inbox). There are three buttons across the top of this pane:

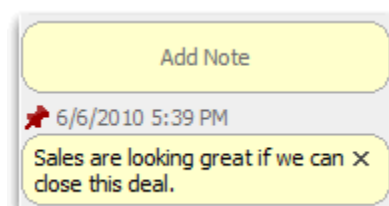
- Click the **Favorite Icon** to toggle favorite status on or off.
- Click on the **Folder** header to open menu with list of favorite Projects and other actions
- Click the **Jump Icon** to navigate within Outlook to the Project folder.



### PROJECT NOTES

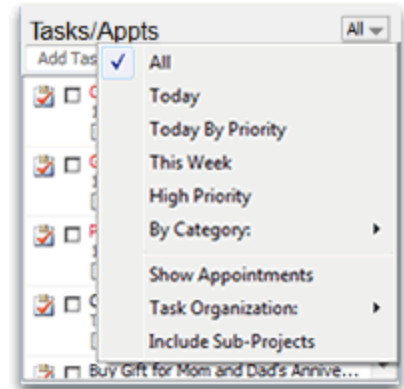
Click Add Note in the Yellow bubble at the top of the Project Summary to add a note about the project:

- Use **CTRL-ENTER** to add a new line.
- Press **ENTER** to complete the note.
- Notes are listed in descending date order. Use the *pin icon* to pin notes to the top of the list.
- Click **X** to delete a note.

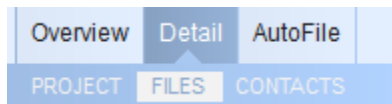


## TASKS/APPOINTMENTS

This section displays all Tasks and Appointments with the current Project assigned to them. All of the options in this pane are the same as the Tasks/Appointments section of the Summary Dashboard. When adding a task from the Project dashboard, by default the current Project is assigned to the task. Select Include Sub-Projects from the Tasks/Appts menu to show tasks for the current project (i.e. *MainProject*) and all sub-projects of the current Project (i.e. *MainProject/SubProject*). The option to organize tasks by either Start Date or Due Date is available via *Task Organization* on the menu.



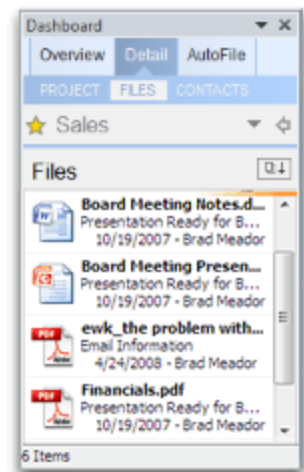
## FILES



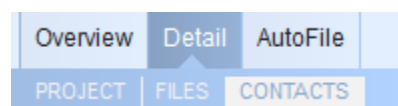
The Files section shows all attachments found in the messages that reside in the Project folder. For attachments that appear in more than one message, click the **more** button to see a list of all emails that contain the file.

Perform the following actions from within the Files pane:

- Double-click a file to open the most recent message to contain that attachment.
- Highlight message(s) and right click to open the message containing the attachment, open the attachment itself or forward or save the selected files.
- Sort the file listing by clicking the sort icon.



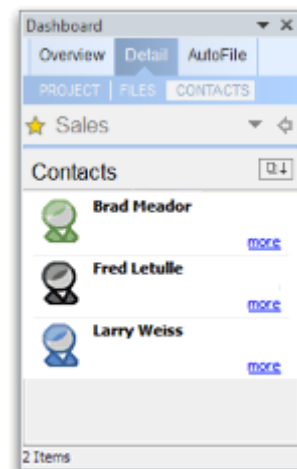
## CONTACTS



The Contacts pane shows all Contacts in the From: fields for messages that appear in the Messages pane. The colored contact icon indicates the assigned priority for the contact. For contacts that exist in the Outlook address book, click **more** to show additional contact details. For contacts that do not exist in the Outlook address book, click **create** to quickly add a record for the current sender.

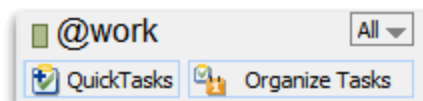
Perform the following actions from within the Contacts pane:

- Double-click a contact to open the contact record. Adjust priority from here to improve Outlook prioritization.
- Highlight contact(s) and right click to email or set up an appointment with the group, export contacts to a file or create a distribution list.
- Sort the contact list by clicking the sort icon.



## CATEGORIES

Open a Context Category in the detail dashboard by double-clicking a category name in the Summary Dashboard. The Detail Dashboard displays all tasks and appointments with the associated Context Category assigned to it (categories with a special character in front of the name - @, !, \*, etc.). Most of the options in this pane are the same as Tasks/Appointments section under Projects above. When adding a task from the Detail dashboard, by default the current Context Category is assigned to the task. The option to organize tasks by either Start Date or Due Date is available via *Task Organization* on the menu.

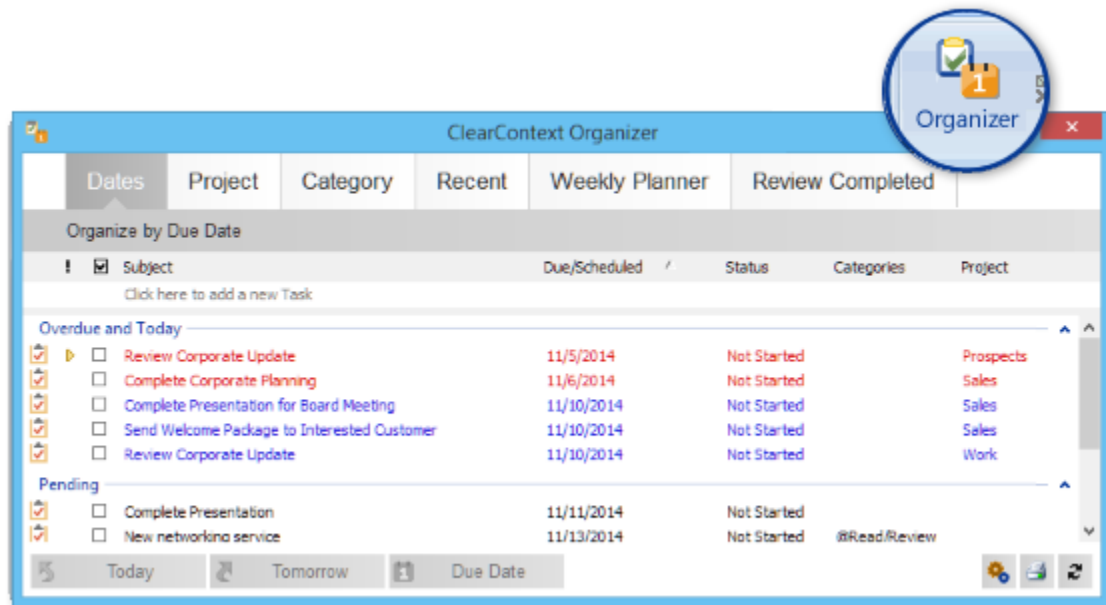


## FAVORITE PROJECTS

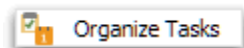
Make your most frequently used projects favorites so that you can quickly open them from the Project tab.

## ORGANIZER: MANAGE AND REVIEW YOUR TASKS

The *ClearContext Organizer* provides an efficient way to assign due dates, projects and categories and a central place to review your work.



Open the Organizer by pressing **Organize Tasks** on the Summary Dashboard, the Organizer icon on the Detail Dashboard or select it from the ClearContext tab/menu.



The organizer is divided into six tabs to quickly sift through your data - *Dates*, *Project*, *Category*, *Recent*, *Weekly Planner* and *Review Completed*.



Throughout the organizer:

- Right click selected tasks to act on them (Mark Complete, Change Due Date, Change Start Date, Change Priority or Mark Next Action).
- Click on a list header to sort tasks. Grouping will not change when you sort - tasks will be sorted within the tab's defined groups.
- Click on a group header to select all tasks in that group.
- Select *Options* to organize tasks by Start Date or Due Date.

The following formatting is applied to tasks:

- Tasks with a Start Date of today are underlined.
- Tasks with a Due Date of today are highlighted in blue.
- Tasks with an overdue Due Date are highlighted in red.
- Tasks marked as Next Action show a small arrow in the priority field.

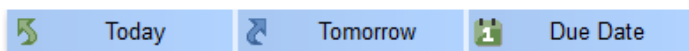
## ADDING OR EDITING TASKS

In any Organizer view, create new tasks on the fly by selecting the *Click here to Add a new Task* box above the list of existing tasks and typing in the task subject. To optionally set other attributes such as date, status, category or Project, tab or mouse click over to another field. Pressing the enter key, or clicking off the new task fields will save the new task and move it to the list of existing tasks. The escape key can be used to discard the new task.

Tasks can be edited in a similar fashion to creating tasks. By first selecting a task item to edit with the mouse, then clicking on the field to change, the task item will enter edit mode and can be saved and changed with the same method as adding tasks.

## DATES

The *Dates* tab lets you quickly identify overdue tasks and/or tasks with no due date



so that you can reassign due dates in bulk. Highlight the tasks that you want to reassign. Use the buttons at the bottom of the window to assign the due date on the selected tasks to today, tomorrow or to a due date of your choosing. When organization by Start Date is selected, the Due Date button becomes a Start Date button.

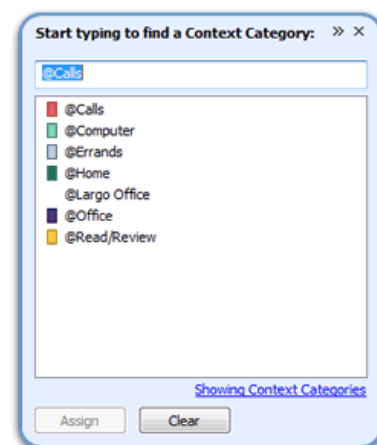
## PROJECT

View a list of all of your tasks by *Project*. Tasks which have not been assigned Projects are listed at the top of the list. Highlight the tasks you want to assign Projects to and select *Assign Project* to assign via the Project Selector.



## CATEGORY

The *Category* tab works in the same way as the Project tab. Assign a Context Category to tasks by pressing the *Assign Category* button at the bottom of the panel. The category list will only display contexts - categories with a special character (@, !, etc.) in front of the name. Mark a task as a *!Next* by pressing the *Next Action* button.





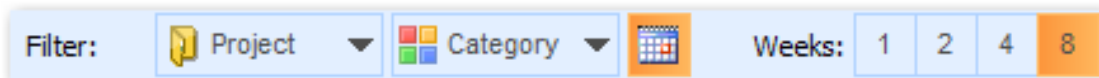
## RECENT

Use the *Recent* tab to view and organize tasks that have recently been created. This organization mode is effectively used with the *QuickTasks* feature. Once a number of tasks have been basically entered in through *QuickTasks* or through Outlook, the *Recent* mode allows you to easily see which tasks lack dates, categories or Project and efficiently assign those attributes.

Note: the same task may be repeated under different groups, since it may meet the attributes of multiple group types. For example, when a task is first created, it may lack a date, category and Project and be listed under the groups *No Date*, *No Category* and *No Project*.

## WEEKLY PLANNER AND REVIEW COMPLETED

Use the *Review* tab to view tasks and appointments for a given date range and to drill down on your activities by Project or Category. The buttons across the bottom of the dialog filter your view:



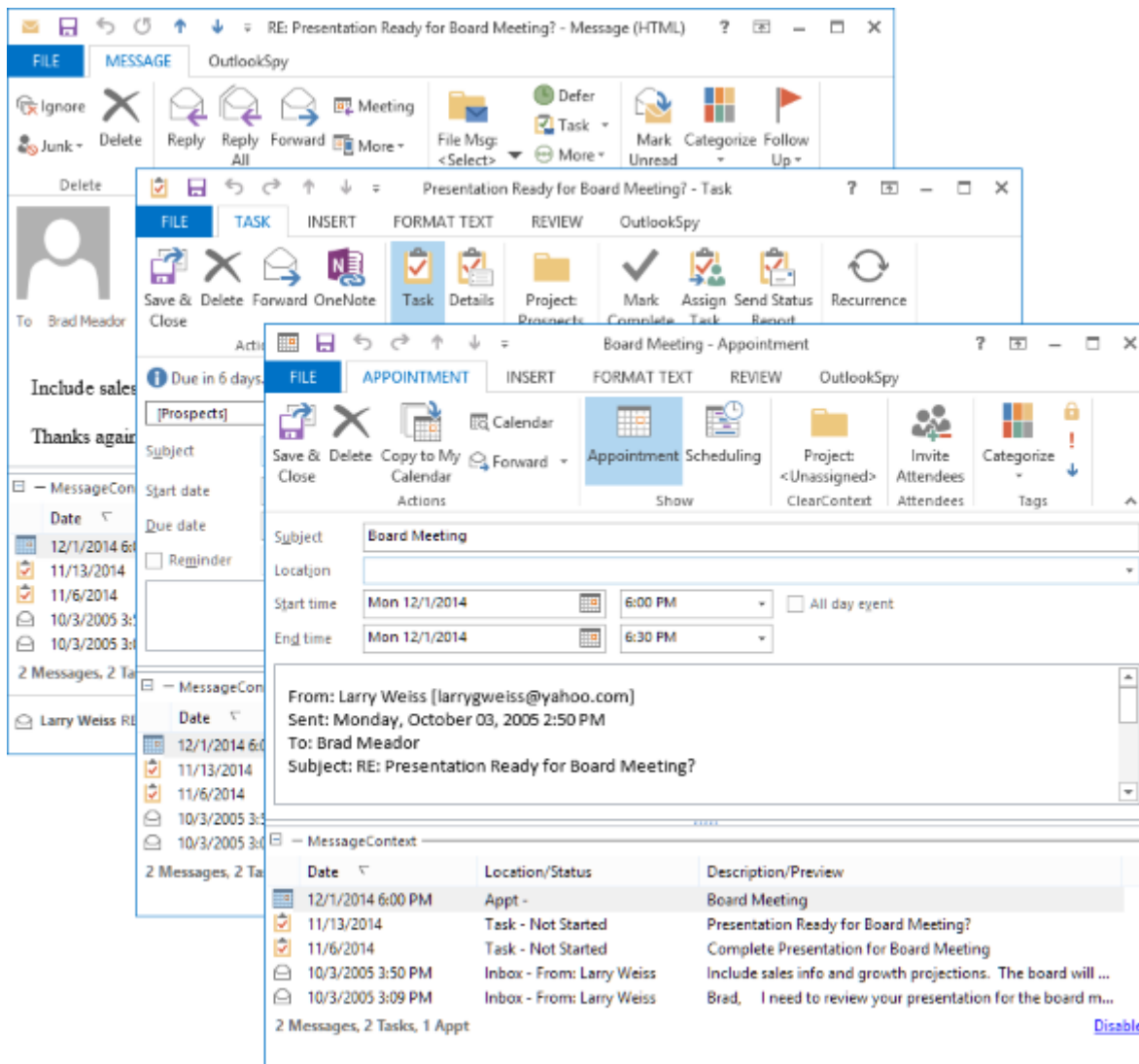
- The *Project* and *Category* buttons allow you to filter your list by an individual Project and/or and individual Category. When filtering by Project, enable *Include Sub-Projects* to see tasks from the current project (i.e. *MainProject*) plus all its sub-projects (i.e. *MainProject/SubProject*).
- Click the *calendar icon* to show/hide appointments.
- Use the *Weeks* buttons to select the number of weeks you want to view in your list.

## ORGANIZER TIPS

While in a project, quickly launch the Project tab of the organizer by pressing the Organize button.

## MESSAGECONTEXT: SEE THE WHOLE CONVERSATION WHEN DEALING WITH MESSAGES

MessageContext provides a complete picture of the current item you are viewing. Open MessageContext to view all messages in the current email conversation as well as tasks and appointments generated from that conversation thread. The MessageContext is integrated in all messages, tasks, and appointments; expand it by pressing + at the bottom of the item.



Double-clicking an item in any MessageContext list will open it if it is available.

The MessageContext can be enabled/disabled for each type of open item window via ClearContext > Options > UI/Toolbar.

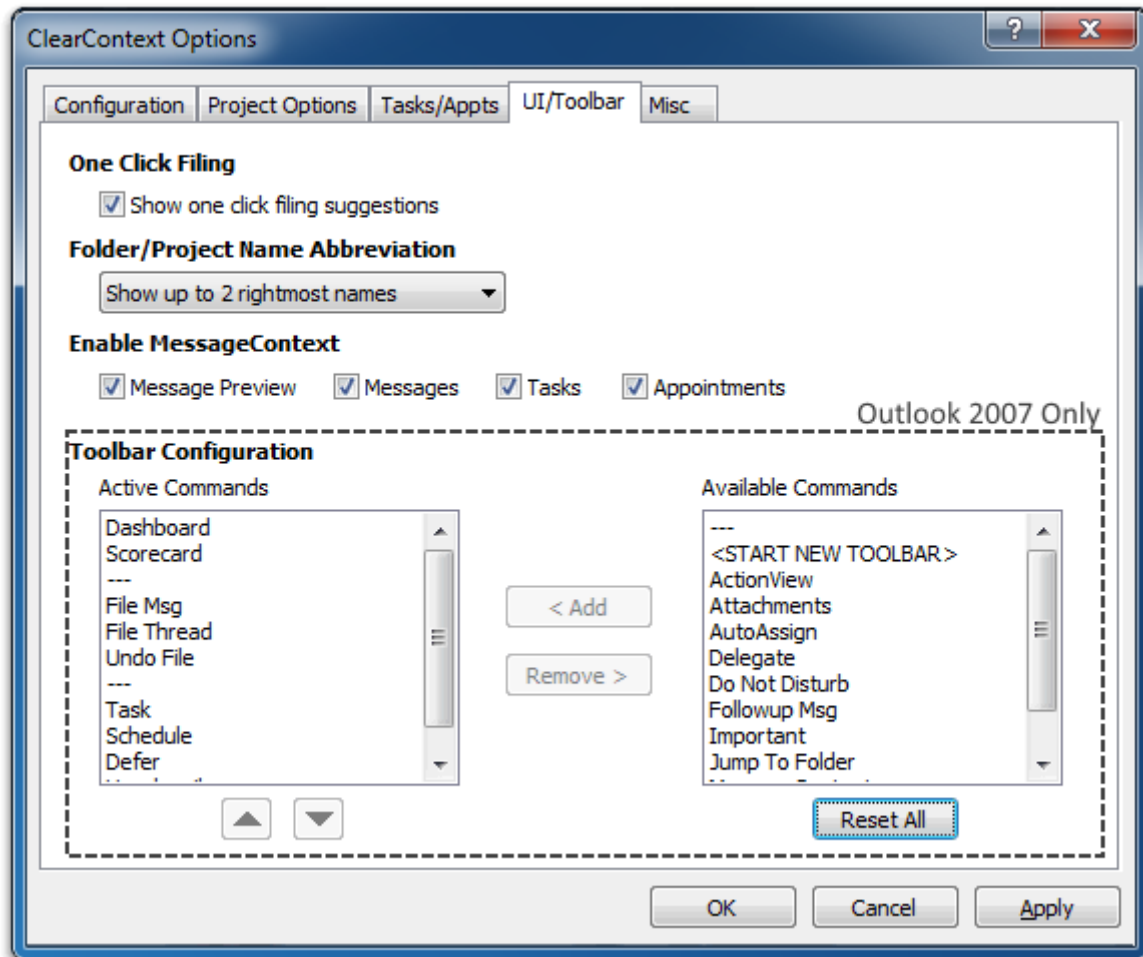
#### REVIEW MESSAGECONTEXT BEFORE REPLYING

This happens all the time - you're in the middle of composing a response to an involved message thread and you want to remember a key point you made in your last email in the conversation. From the reply, open MessageContext, view the entire conversation, and find your previous comments.

## MORE

### TOOLBAR MANAGEMENT: CONFIGURE CLEARCONTEXT TO WORK THE WAY YOU DO

There are a number of options to customize the toolbar to best fit the way you work:



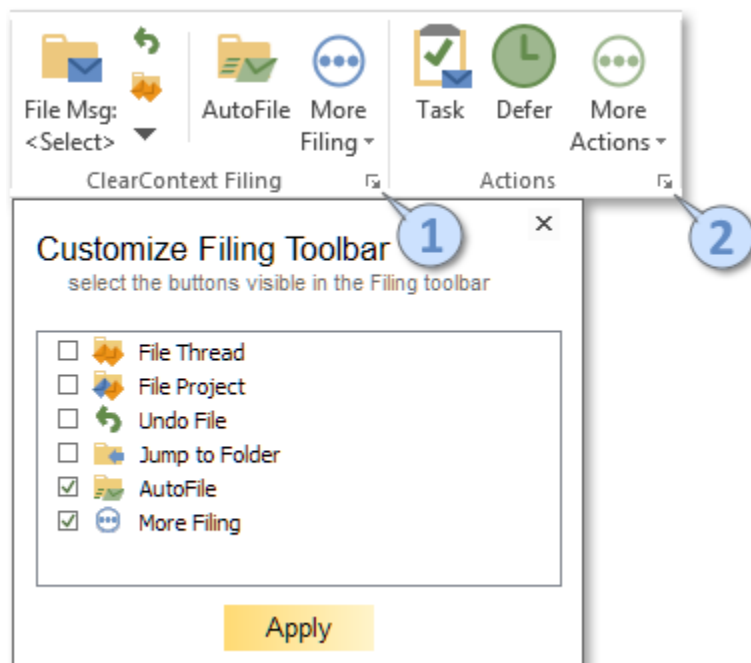
- **One Click Filing:** Choose whether ClearContext displays suggests Filing folders for messages whose subjects has not previously been filed to a specific location before. These suggestions are based on recent filing history and the sender of the message.
- **Folder/Project Name Abbreviation:** Choose how ClearContext abbreviates the display for Project/Folder names in the toolbar. For example, with the default option of showing the 2 right most names, the folder *Client/Contoso/Billing* would be shown as *../Contoso/Billing*. When the mouse pointer is held over the filing button, a mouse over window will display the full unabbreviated name.

- **Enable MessageContext:** Choose whether the Outlook window integrated MessageContext is enabled for the listed types of windows.
- **Toolbar Configuration:** This section appears for Outlook 2007 only. For customization of the toolbar in Outlook 2007, or customization of the Ribbon in Outlook 2010 and newer, please see below.

## Toolbar Customization

### Outlook 2010/2013

The ClearContext tab of the Outlook window lists all available ClearContext functions. A subset of frequently used ClearContext features are also listed in the default Home tab under the *ClearContext Filing* and *Actions* sections. The home tab buttons can be customized to add or remove most available functions:



1. Opens the Filing customization window to select which Filing buttons are shown
2. Opens the Actions customization window to select which Action buttons are shown

### Outlook 2007

ClearContext adds a single toolbar to the Inbox with the applications most-used functions. Add or remove buttons from this toolbar via *ClearContext > Options > UI/Toolbar*. To add buttons to the toolbar, highlight the button name in the *Available* column and click **Add**. To remove, click items in the *Active* column and

click **Remove**. Use the arrows below the Active field to change the order of the toolbar buttons. **Reset All** will put the buttons back in their factory default positions. You will need to restart Outlook for the changes to take effect.

### ADD A SECOND TOOLBAR

Add <START NEW TOOLBAR> to the active column to create a second toolbar. Any items that appear in the active list below <START NEW TOOLBAR> will be placed on a second toolbar. One caveat - the items marked "*Drop Down Selector*" must appear on the first toolbar.

## ATTACHMENT EXPLORER: PREVIEW OUTLOOK ATTACHMENTS LIKE FILES IN WINDOWS

The Attachment Explorer allows you to preview attachments within Outlook folders as if you were viewing them in a Windows file folder.



### PREVIEW

Launch the Attachment Explorer:

- Outlook 2010: Click on the ClearContext tab, and then the *Attachment Explorer* button.
- Outlook 2003/2007: Select *ClearContext > Tools > Attachment Explorer* from the ClearContext Outlook menu. This button can also be added to the ClearContext toolbar.

The Attachment Explorer will default to displaying the files in the current folder in Outlook. A different folder can be selected for preview in the folder list to the left. The middle window pane will show the list of attachments in the folder, and the right window pane will show a larger preview once a file is selected.

\* The types of files that are capable of being previewed will vary according to the Windows version and Office version.

## CHANGE VIEWS

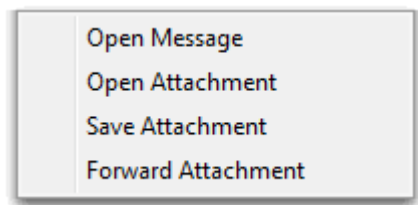
While in the Attachment Explorer, there are several ways to change the file display:

- Select the *Views* button to choose another view: switching to a smaller detailed list of the attachments in this folder, larger thumbnails, etc..
- Click the *Sort* button to change sorting by attachment name, type, received date, etc..
- Drag the bar between the 3 window pane areas to change the width of these areas.

## ACTIONS

Select files in the attachment explorer by clicking on them. Right click for available actions on these attachments. Choices include:

- Open the messages containing the selected attachments
- Open the attachments themselves
- Save the attachments to a file folder
- Forward the attachments via email

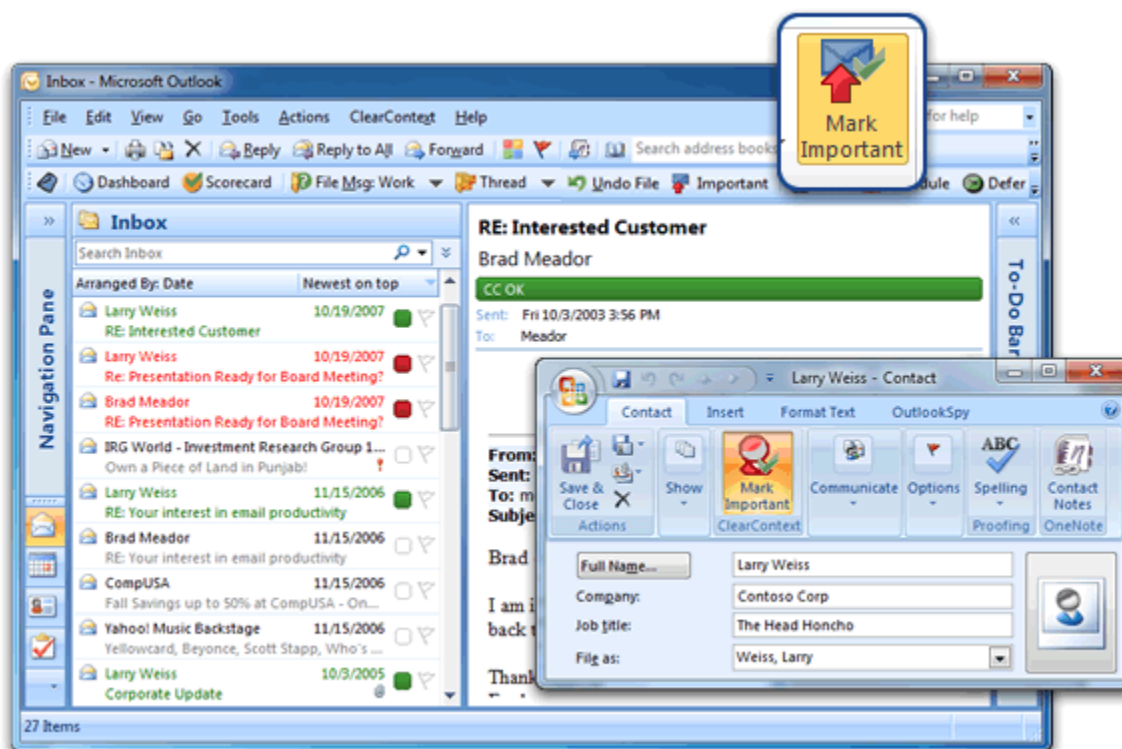


## QUICKLY OPEN MESSAGES

Double-clicking an attachment in the file list will automatically open the message it is attached to. Quickly open the email that contains the attachment you are previewing by clicking the link at the bottom of the preview pane.

## MARK IMPORTANT: HIGHLIGHT EMAIL FROM IMPORTANT CONTACTS IN OUTLOOK

Marking Important emails is an optional ClearContext feature that can be enabled in the *ClearContext* > *Options* screen. When enabled, ClearContext marks messages as known or important when the sender of the email is found in your Outlook Contacts. Contacts that have *Mark Important* enabled have emails marked with the *CC VIP* tag and contacts that exist but do not have Mark Important enabled are marked with *CC OK*. Individual email conversations can also be marked important via the Mark Important button on the toolbar.



### CC VIP



The Mark Important button is available when opening Outlook contacts. By default, email received from these contacts are marked with category *CC VIP* and color-coded **red**. Manually mark/un-mark a message as a VIP using the *Mark Important* button. This will automatically adjust the contact priority and future messages will reflect the change.

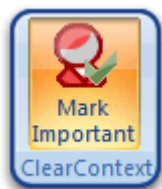
### CC OK



All messages from known senders are marked with category *CC OK* and color-coded **green**. These include messages from contacts that are in your address book - but not marked important - and messages from contacts that are not in your address book but are replying to conversations that you have already participated in.



## CONTACT PRIORITY



Also adjust priority via contact records. Open the contact for an important sender and press Mark Important. All future messages from this sender will be designated *CC VIP*.

## VIEWS

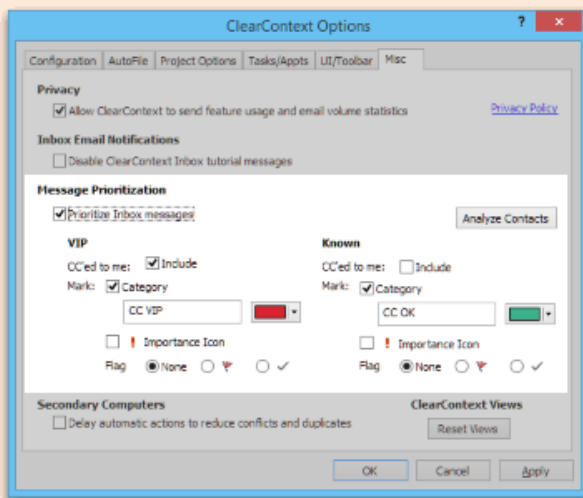
When the appropriate ClearContext view is selected in the Outlook view menu, messages are color coded using Inbox category colors. The ClearContext views can be selected from the Outlook view menu (*View > Current View*). There are three views installed during setup:

- *ClearContext By Date* - messages ordered by received date
- *ClearContext Threaded* - messages grouped by conversation and ordered by date
- *ClearContext Prioritized by Category* - messages grouped by category

If you change options below, the views above may no longer color code by priority.

## PRIORITIZATION OPTIONS

Enable or adjust prioritization options via *ClearContext > Options > Configuration*:



- *Prioritize Inbox messages* – enable message prioritization
- *CC'd to me* - enable this option to prioritize messages that you are copied on
- *Category* - change category name, color and enable/disable
- *Importance Icon* - append the Outlook importance icon to messages according to priority. Note that this priority may also be communicated in message forwards and replies.
- *Flag* - add a flag or check for each priority. Flagged messages will appear in the To Do List.

## EMAIL SCORECARD: MEASURE YOUR EMAIL EFFECTIVENESS

The *Email Activity Index* provides an overall assessment of how effectively you're managing your email and how heavy a workload you're facing.








To view your Email Activity Index:

- Outlook 2010: select the ClearContext tab and press the *Email Stats* button
- Outlook 2007: select *Email Scorecard* from the ClearContext menu.

A browser window will open, displaying your some basic stats about your email usage along with the ClearContext Email Index.

## CLEARCONTEXT EMAIL INDEX RATING: EFFECTIVENESS

This score is an overall measure of how effectively you are managing your email communications. The higher your score, the better you are doing with email!

-  **Excellent (80 - 100):** great job at staying on top of email and getting a lot done!
-  **Very Good (60 - 79):** you are doing a good job at keeping up with email!
-  **OK (40 - 59):** you are managing to stay in control of your email.
-  **Warning (20 - 39):** you are falling behind in your email communications.
-  **Danger (0 - 19):** Your email is getting totally out of control.

## RATING AREAS

Your email effectiveness score is made up of three components:

- **Response Time:** This factor measures how promptly you are responding to emails. Getting back to emails that require responses within 24 hours will result in a good response time score. Use the ClearContext Daily Workflow to get through your email faster.
- **Inbox Control:** This factor measures how effectively you are processing the messages in your inbox. The more messages you have in your inbox and the longer it takes you to read, file, and/or delete messages, the lower your score will be. Manage your Inbox more efficiently with these tips.
- **Communication:** This factor measures how well you are doing at sending out messages and processing messages that require response/action.

## CLEARCONTEXT EMAIL INDEX RATING: WORKLOAD

Your workload score measures how heavy your email communication volumes are. The more emails you send and receive, the higher your workload score will be – and the harder it is for you to keep on top of your email! Review [Top Five Ways to Reduce Email Traffic](#).

## CLEARCONTEXT ONLINE

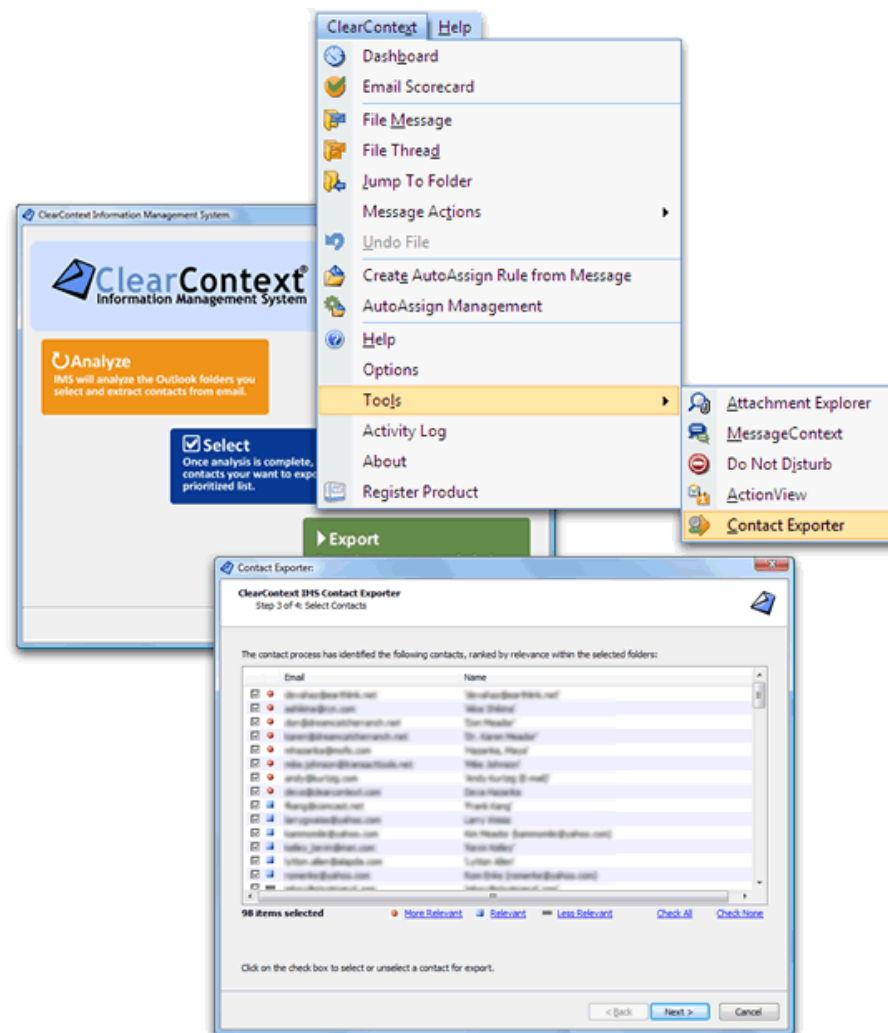
Register with ClearContext Online to see additional email usage metrics. After registering:

- Compare your stats with individual users
- Join groups to compare with colleagues
- Share your email activity index with others
- View additional, detailed graphs including responsiveness, effectiveness and workload



## CONTACT EXPORTER: IDENTIFY AND EXTRACT YOUR HIGH PRIORITY CONTACTS

The Contact Exporter lets you create and export groups of email addresses found in messages stored in the Outlook folders you select.



Select the email addresses from a prioritized list of contacts generated for you to create an Outlook distribution list, Outlook contact records, or a CSV export file.

- **Send a group email to people on your team** - Select your work or team folder and create an Outlook distribution list.
- **Create a party invitation for your friends** - Select your personal correspondence folders and generate a list that you can send an email to or export to an online invitation service.
- **Add all your business contacts to LinkedIn or your personal contacts to Facebook** - Select the appropriate folders and create an export file you can upload.

### To use the Contact Exporter:

1. Go to *ClearContext > Tools > Contact Exporter* from the main menu.
2. Select the folders containing emails you want to export contact information from.
3. The contacts found in those folders are divided into a list divided into three groups: **More Relevant**, **Relevant**, and **Less Relevant**. Use the selection links to select/deselect groups of those contacts or the checkboxes to individually select/deselect the contacts you want to export.
4. Check the export formats you would like for the email addresses and enter names for the files – Outlook distribution list, Outlook contact records, or CSV file.

### IMPORT CONTACTS INTO POPULAR WEBSITES

Once you've created the list, you can import these contacts into any services that accept CSV files. Here are import links for a few popular sites (log into the sites before clicking the links below):

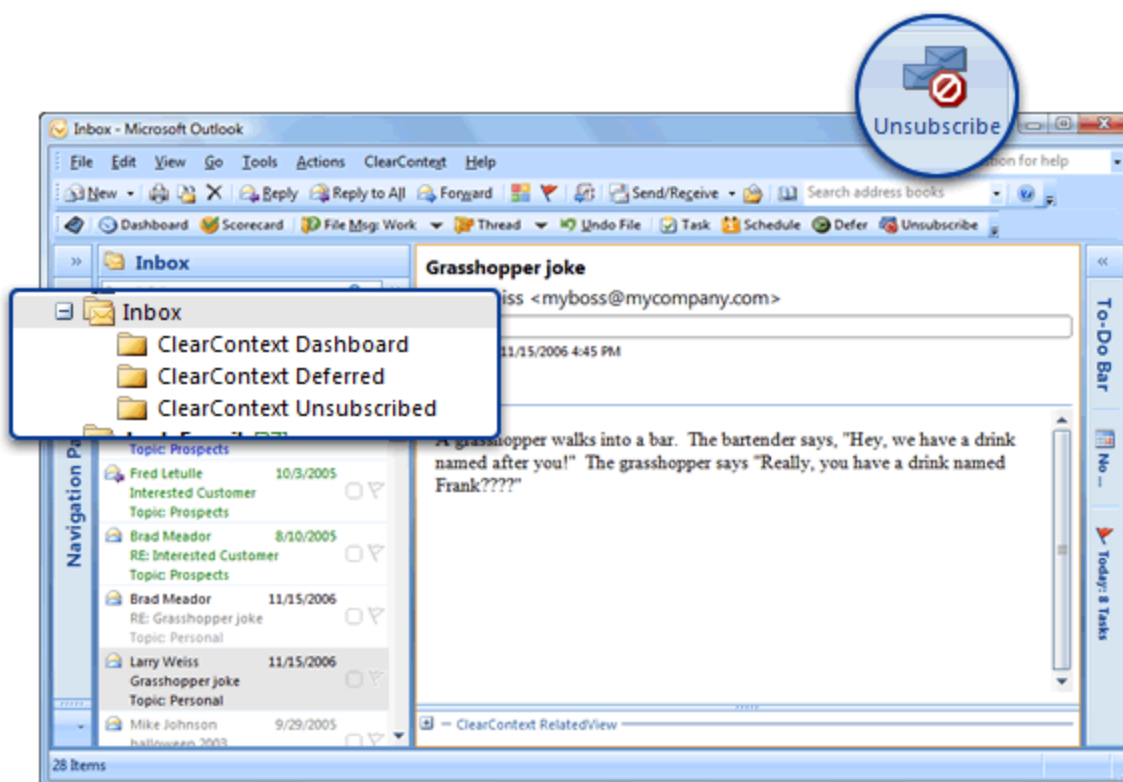
- [LinkedIn](#)
- [Facebook](#) (click *Email Application* and scroll down to *Contact File*)
- [Evite](#)
- [Socializr](#)

## DEPRECATED

### UNSUBSCRIBE FROM THREAD: REMOVE UNWANTED CONVERSATIONS FROM THE INBOX

**Unsubscribe is a deprecated feature enabled only for Outlook 2007. For users using Outlook 2010 and newer, the built in Outlook function Ignore is suggested.**

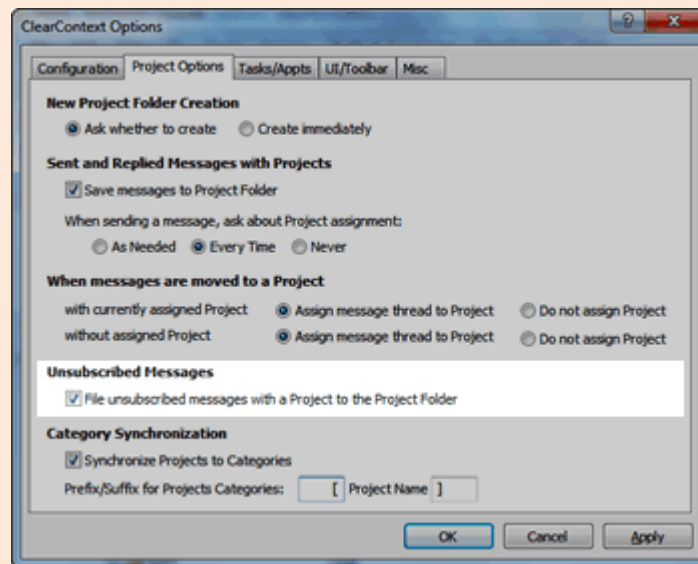
Unsubscribe from Thread allows you to remove all current and future messages in a conversation out of the Inbox so that they don't clutter your Inbox.



When copied on a long email thread that you have no interest in (i.e. joke threads, happy hour planning, etc.), highlight a message from the thread, click *Unsubscribe*, and all Inbox messages from that conversation will be automatically moved to the ClearContext Unsubscribed folder (a sub-folder of Inbox). All future messages that you receive from the same conversation will automatically be moved to this folder as well. To re-subscribe to the thread, go to the ClearContext Unsubscribed folder, highlight a message from the thread, click *Unsubscribe*, and future messages you receive will stay in the Inbox.

## UNSUBSCRIBE TO PROJECT FOLDERS

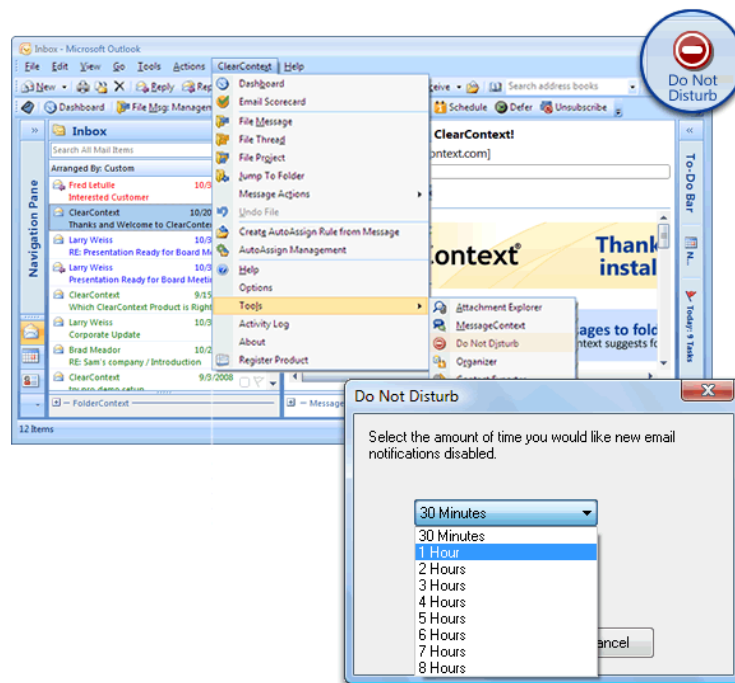
If a Project is assigned to the current thread, ClearContext can send unsubscribed messages to Project folders rather than the ClearContext Unsubscribed folder. To turn this option on, go to *ClearContext > Options > Project Options* and check "If Project is assigned, file unsubscribed messages to Project Folder."



## DO NOT DISTURB: FOCUS ON YOUR WORK WITHOUT DISTRACTION

**Do Not Disturb** is a deprecated feature enabled only for Outlook 2007.

**Do Not Disturb** disables all default Outlook notifications for new messages, including New Mail Desktop Alerts, changes in the mouse cursor, the envelope icon in the system tray and the default new mail sound.



To use this feature, select **Do Not Disturb** from the ClearContext menu. In the Do Not Disturb dialog, select the length of time that you would like to have new mail notifications disabled and click OK. When the time frame specified has past, ClearContext will re-enable message notifications. If you would like to reset your notifications prior to the expiration time, select Do Not Disturb from the menu again. Do Not Disturb will also reset notifications if you restart Outlook.

By default, the Inbox toolbar does not include the Do Not Disturb button. You can add it to the toolbar via toolbar customization.

*\* Do Not Disturb is available for Outlook 2007 and earlier only.*

### SUCCEED

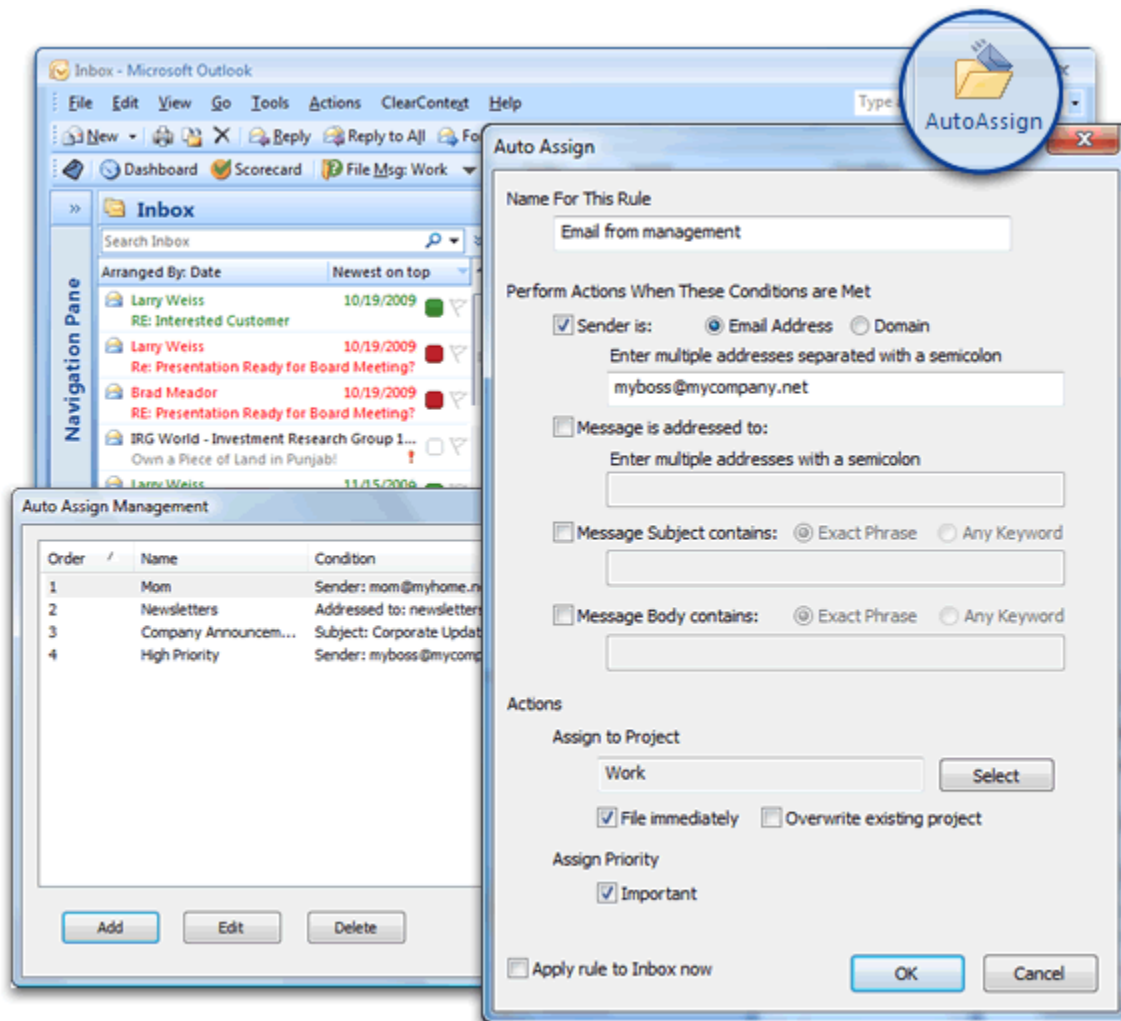
When you're ready to focus on your projects, use Do Not Disturb to ensure that you aren't distracted by incoming email.



## AUTOASSIGN: CREATING RULES TO AUTOMATICALLY ORGANIZE EMAIL

**AutoAssign is a deprecated feature enabled only for previous users of ClearContext who have active AutoAssign rules. AutoFile is the replacement feature for AutoAssign.**

ClearContext AutoAssign functionality lets you create rules to automatically prioritize and/or file your incoming email based on parameters that you set. By using AutoAssign, you can easily organize messages such as newsletters, business email, and personal correspondence. AutoAssign rules take precedence over AutoFile rules. When a message is received that meets the criteria of both an AutoAssign and an AutoFile rule, the AutoAssign rule will be applied.



## TYPES OF AUTOASSIGN RULES

You can create an AutoAssign rule by selecting the AutoAssign button on the Inbox toolbar or by accessing AutoAssign in the ClearContext options menu. AutoAssign rules can be created based on any combination of the factors below. In italics, we have highlighted examples of the types of email messages that might be filed using these rules.

- **Sender email or domain address** - These parameters are used to execute a rule based on the email address or domain that sent the email. Enter multiple addresses separated by a comma. *Designate emails from your boss with a project such as **Work**. Designate messages from a certain domains as a project such as **Newsletter** and automatically file them out of your inbox where you can read them later.*
- **Message is addressed to** - This parameter can be used to apply a rule to an incoming message based on who the message has been sent to. Enter multiple addresses separated by a comma. *Flag emails sent both you and your boss with project **Management**. **Mark Important** messages sent to a business or private email address so these emails are automatically highlighted in your Inbox.*
- **Keywords contained in the message body or subject** - ClearContext can search incoming messages for keywords that you designate. Designate an exact phrase or multiple keywords via the radio buttons above the rule. *Set the project for regularly received emails with a certain subject (like "Order Information") to a project such as **Receipts** and automatically file these messages. Search for keywords such as a stock symbol or major client name and **Mark** these messages **Important**.*

## AUTOASSIGN ACTIONS

The following actions can be taken on messages that meet the criteria you designate in the AutoAssign rule:

- **Assign to project** - designate a specific project to be set for these messages. This project can be used to both identify messages by project in the Inbox and for automated filing.
- **Assign Priority** - assign a priority to these messages. This priority will set the color of messages in your Inbox.
- **File Immediately** - messages processed by the rule can be automatically filed to the designated project folder. This is very useful for messages such as Newsletters and Mailing Lists that can be automatically moved out of the Inbox into their own folders.
- **Overwrite existing project** – this forces the rule to overwrite the project on messages that are part of a thread with a previously assigned project name.

## MANAGING MULTIPLE RULES

The AutoAssign Management Dialog allows the user to create and maintain AutoAssign Rules. The dialog can be accessed directly from the ClearContext Menu (*ClearContext > AutoAssign Management*). Use the arrows on the right hand side of the window to move a rule up or down in priority. Once a single rule is executed against a message, the following rules are ignored. To execute all rules against the inbox, click the *Apply Rules to Inbox* button on this dialog.

### AUTOASSIGN TIPS

*Automated Rule Creation:* To create an AutoAssign rule for a type of message (for example a newsletter that you would like automatically filed), highlight the email message, click the *AutoAssign* toolbar button, and the email's parameters (address, subject, etc.) will be pre-filled in the AutoAssign rule creation dialog.

*Automatic Filing:* For messages that you want filed, but do not wish to see in your inbox, set up an AutoAssign rule with the message criteria you desire and click the *File immediately* checkbox. On receipt, new messages that meet your requirements will be automatically filed in the folder you have designated in the "Assign to project" drop down menu.

*Inbox Cleaning:* Do you have a bunch of messages that you want to prioritize, add project names to, and/or file away? Use the *Apply rule to existing Inbox messages* now feature when creating AutoAssign rules to ensure that existing messages in the inbox that meet your criteria are processed appropriately

## ADDITIONAL RESOURCES

If you didn't find what you were looking for in this User's guide, additional product information is available on <http://www.clearcontext.com>. If you use the GTD system to manage your workday, download our [GTD setup guide](#). Finally, if you can't find what you are looking for in these pages, head to our help pages at <http://www.clearcontext.com/help/>.