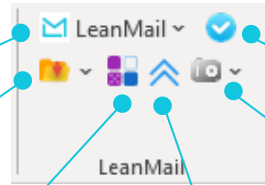


# Cheat Sheet - LeanMail InstantArchive

## InstantArchive Toolbar



- LeanMail options dropdown
- InstantArchive button
- Categories button
- Collapse all groups button
- Printscreen button (customer service)
- Reply "Complete"

## File

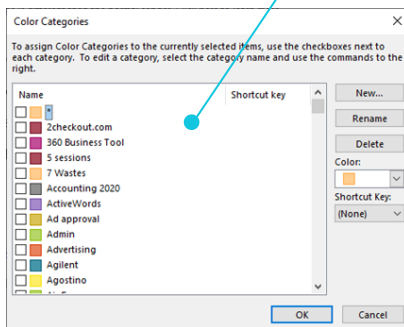
Or



**Note:** see quick set up in page 2

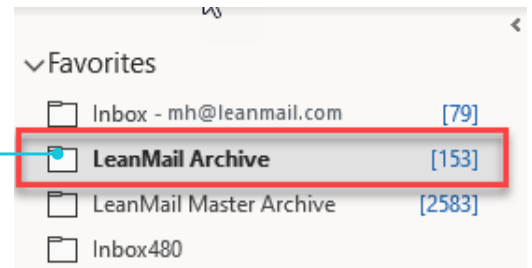
## Categories

Think of categories as tags that stick to emails in the same way Gmail labels do

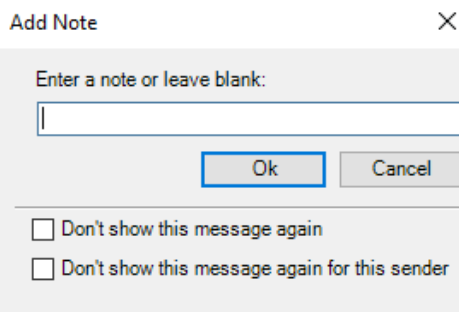


## Find your email in the LeanMail Archive

Click on the LeanMail Archive folder

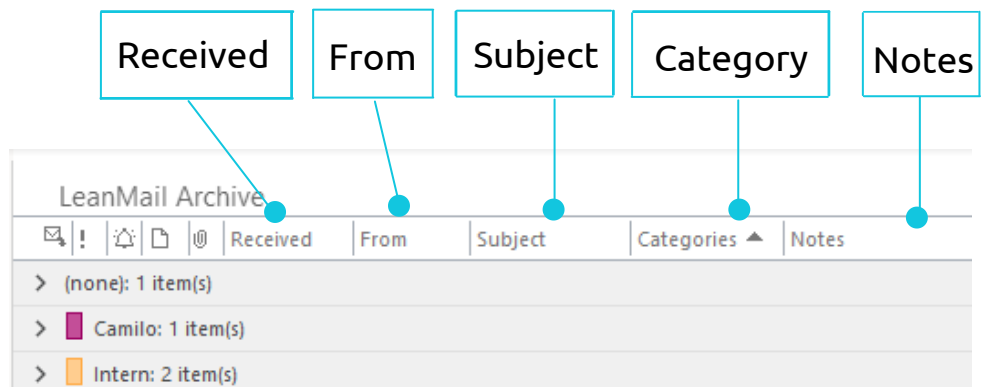


**Note:** You will need to make categories as you go by tabing once and entering "New".



When you begin the archiving process, a new dialogue box will open asking you for a note. If the notes option is activated (see P.2)

## Sort

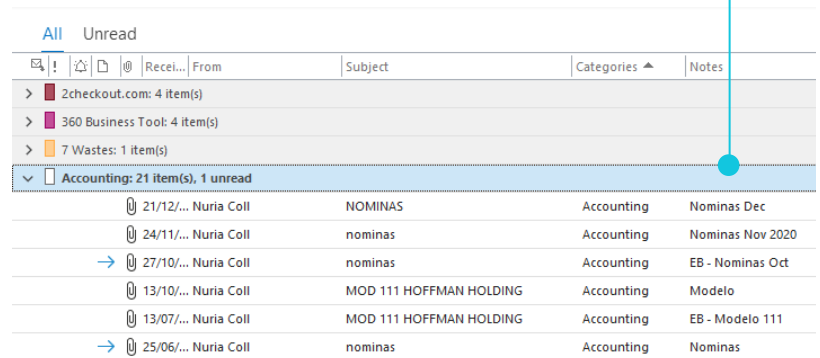
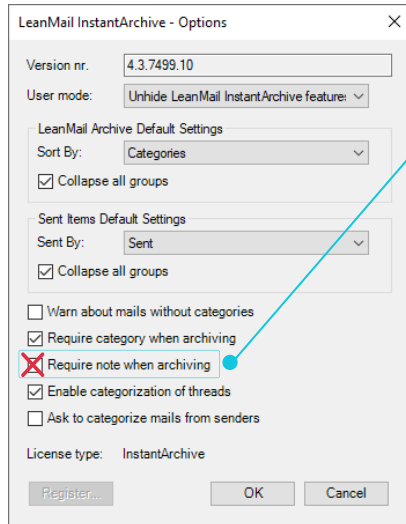


# Cheat Sheet - LeanMail InstantArchive

## Activate your notes

Click on the LeanMail dropdown/  
Options/ InstantArchive tab and  
select "Require note" when archiving

Add a note  
column



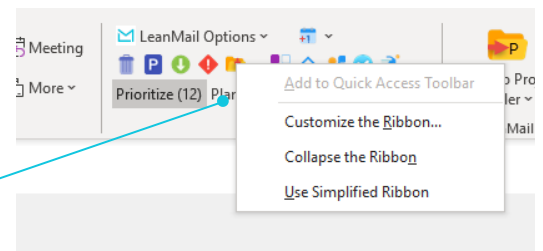
	From	Subject	Categories	Notes
>	2checkout.com: 4 item(s)			
>	360 Business Tool: 4 item(s)			
>	7 Wastes: 1 item(s)			
▼	Accounting: 21 item(s), 1 unread			
	21/12/... Nuria Coll	NOMINAS	Accounting	Nominas Dec
	24/11/... Nuria Coll	nominas	Accounting	Nominas Nov 2020
→	27/10/... Nuria Coll	nominas	Accounting	EB - Nominas Oct
	13/10/... Nuria Coll	MOD 111 HOFFMAN HOLDING	Accounting	Modelo
	13/07/... Nuria Coll	MOD 111 HOFFMAN HOLDING	Accounting	EB - Modelo 111
→	25/06/... Nuria Coll	nominas	Accounting	Nominas

Double sort: Click on  
the first column you  
want to sort by, then  
click shift and on the  
second column you  
want to sort by.

## Quick-key Set-up for Archiving via the keyboard

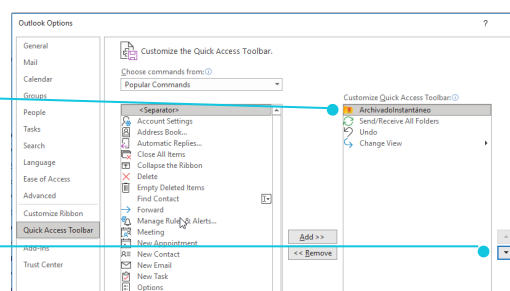
Creating this set-up will allow you  
to archive mails without your  
hands needing to leave the  
keyboard, by using the command:  
Alt+1

Right-click the InstantArchive  
button and choose Add to Quick  
Access Toolbar



Put the InstantArchive button in  
the first position

Use the arrows to  
move the folder to the  
first position



## How to Archive instantly

1. Click on the InstantArchive button or, if you have configured the quick access buttons, tap Alt+1. (The following steps should be carried out directly from your keyboard instead of using your mouse.)
2. Choose a category by typing the first few letters from your keyboard. Tap the space bar to check the box, then Enter.
3. If the category doesn't exist hit your tab key once, then Enter. Type the name of the category, then Enter.
4. If the Notes option has been selected in Options, enter a note, then OK.