

Getting Started with QuickMail™ Pro

for Mac® OS



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CHAPTER 1

INSTALLING AND LAUNCHING QUICKMAIL PRO

QuickMail Pro 2.0 provides an intuitive interface and feature set that you will find invaluable when handling your E-mail. This chapter guides you through the process of installing and launching QuickMail Pro.

INSTALLING QUICKMAIL PRO

Before installing QuickMail Pro, back up the :System Folder:CE Software folder and restart your computer with all virus-detection software disabled. Additionally, you must logout of prior versions of QuickMail and quit all other QuickMail-related applications.

1. Insert the QuickMail Office CD or download the QuickMail Pro installer from your local computer network.
2. Double-click the client installer to begin installation. The QuickMail Pro splash screen appears.



Figure 1: The QuickMail Pro splash screen

3. Click **Continue** in the splash screen. The ReadMe contents appear in a scrollable window. The ReadMe information provides installation notes and tips about the software.
4. Click **Continue** once you have read or printed the information in the ReadMe.
5. The License and Warranty agreement appears. Click **Agree** to proceed with installation.
6. Select the location on your hard drive where you wish to install QuickMail Pro and click **Install**. CE Software recommends installing it at the main level of your hard drive.

7. Click **Yes** to restart your computer at the end of the installation process. A progress bar displays the status of the installation.

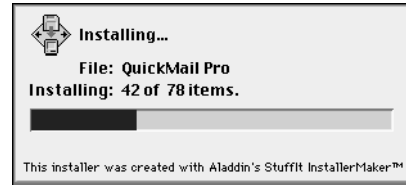


Figure 2: Monitor the installation process with the progress bar.

8. When the installation process is complete, click **Restart** at the prompt.

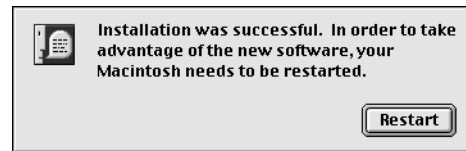


Figure 3: Click the Restart button to restart your computer.

UPGRADING QUICKMAIL PRO

Upgrading QuickMail Pro requires the same steps as a new installation. The only difference with an upgrade is that you are working with existing data that should be archived before proceeding with the installation.

When you upgrade QuickMail Pro, all your address books, address groups, and filed mail are automatically carried over and updated.

STARTING QUICKMAIL PRO

The QuickMail Pro dialog that appears when you restart your computer is different depending upon whether QuickMail Pro 2.0 is a new installation or an upgrade. This section discusses both scenarios so you know what to expect when you launch QuickMail Pro after installation.

NEW INSTALLATIONS

When you install QuickMail Pro for the first time, an Account Assistant displays after you restart your computer. The Account Assistant guides you through the process of setting up your E-mail account.

1. If you are using QuickMail Pro Server 2.0, select Auto-configure the account and click the right arrow button to continue. If you are connecting to a mail server that does not use QuickMail Pro Server software, click the Configure the account manually option.



Figure 4: The QuickMail Pro Account Assistant

- ❖ If you choose to manually configure your account, you must provide an activation key for QuickMail Pro when you click the right arrow button.
2. Type the name of your E-mail host. The host can be your mail server's IP address or domain name. Click the right arrow button when you are done specifying a host.



3. Select your account from the list that appears and click the right arrow button. The list is populated by QuickMail Pro Server.



4. Type your E-mail password at the prompt and click the right arrow button. Your mail administrator should provide your password.



5. Read the final Account Assistant window and click the Finish button.



The QuickMail Pro Message Browser window (shown on page 6) appears when you are finished with the Account Assistant.

The Second Login

The next time you want to login to QuickMail after setting up your account, follow these instructions.

1. Select Open QuickMail Pro from the QuickMail Pro Menu in the upper right corner of your screen. (See Figure 5 to view the QuickMail Pro menu.)

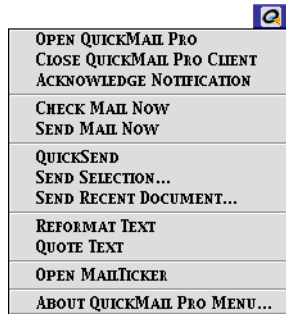


Figure 5: The QuickMail Pro menu

2. Type your password at the prompt and click the Login button. Before QuickMail Pro displays the Message Browser, you see a prompt for activation key information



Figure 6: The QuickMail Pro Login screen

3. Click Activate using QuickMail Pro 2.0 Server if your mail administrator uses QuickMail Pro Server version 2.0 as the mail server. If you are not using QuickMail Pro Server, click Activation Key and type

the activation key listed on the registration card provided by CE Software.

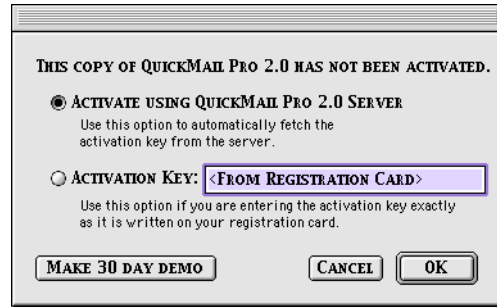


Figure 7: The QuickMail Pro activation dialog

4. Click OK when you have provided the necessary activation information. The QuickMail Pro Message Browser appears.

All future logins display the Message Browser immediately after you complete the QuickMail Pro login screen.

UPGRADES

When you upgrade to QuickMail Pro 2.0, a login dialog appears after you restart your computer.



Figure 8: The QuickMail Pro Login screen

1. Type in your E-mail password and click Login to display the activation key dialog shown in Figure 7.
2. Click Activate using QuickMail Pro 2.0 Server if your mail administrator uses QuickMail Pro Server version 2.0 as the mail server. If you have a registration card from CE Software, click Activation Key and type the activation key listed on the card
3. Click OK when you have provided the necessary activation information. The QuickMail Pro Message Browser appears.
 - ❖ Your E-mail password should remain the same when you upgrade to QuickMail Pro 2.0, unless your mail administrator requests that you use a different password.

All future logins display the Message Browser immediately after you complete the QuickMail Pro login screen.

QUICKMAIL PRO DEMOS

If you select the **Make 30 Day Demo** button shown in Figure 7, you can use QuickMail Pro for 30 days with no cost or obligation. If you choose to purchase QuickMail Pro during the 30 day demo period:

1. Make QuickMail Pro the active application on your desktop and select **Register QuickMail Pro** from the Apple menu. The same dialog shown in Figure 7 appears.
2. Type the activation key you purchased and click **OK**. QuickMail Pro immediately recognizes that the installation has been switched from a demo to a full version of QuickMail Pro.

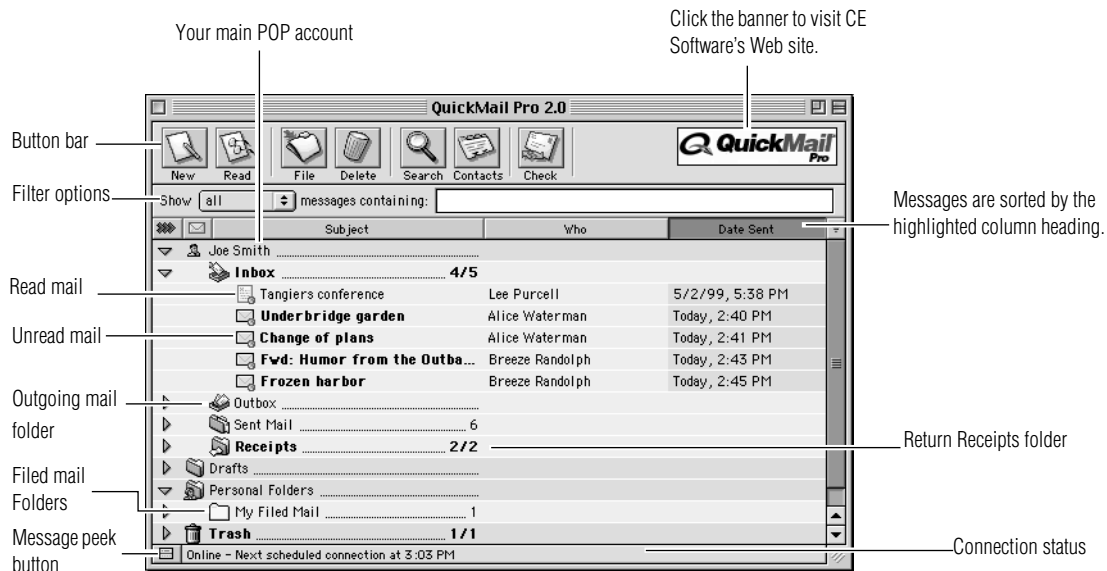
CHAPTER 2 GETTING STARTED WITH QUICKMAIL PRO 2.0

This chapter introduces you to the QuickMail Pro interface and the features in the software you will be using most frequently. The chapter contains information that is relevant to new users as well as users who have recently upgraded from a prior version of QuickMail Pro.

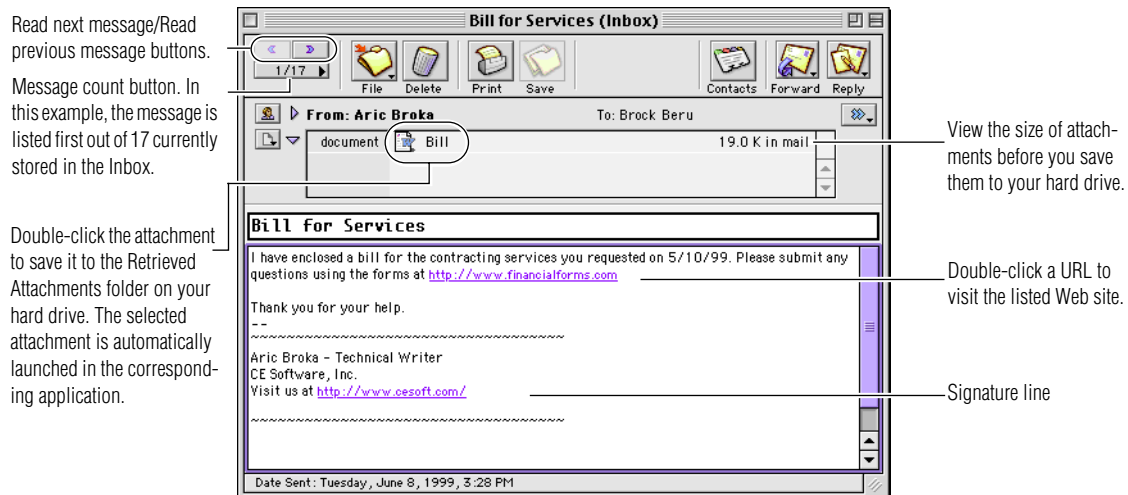
INTERFACE CHANGES

The most noticeable change in QuickMail Pro is its interface. There are three primary windows you can view with version 2.0 of QuickMail Pro: the Message Browser window, the Contacts Manager window, and Message windows.

THE MESSAGE BROWSER WINDOW



THE MESSAGE WINDOW THAT APPEARS WHEN YOU READ MAIL



WORKING IN QUICKMAIL PRO

This section highlights how to set up and use some of the features that are new in QuickMail Pro 2.0. For additional information on the QuickMail Pro feature set, use the printed *QuickMail Pro User Guide* that accompanied your software. If you downloaded the QuickMail Pro installer, use the PDF version of the *User Guide*.

READING MESSAGES

When you read your mail, you can use a variety of methods to navigate through your messages.

- Use the scrolling arrow buttons in the upper left corner of the Message window to go to the next message or the previous message.
- Use the message count button in the Message window to view different messages in your Inbox. The message count button displays each message listed in your Inbox in sequential order.

- Click the Message Peek button in the lower left corner of the Message Browser to view messages without opening them.
- Use the filtering feature to view only the messages that meet certain criteria. For example, show only unread messages.

FORWARDING MESSAGES

When you forward messages, you have three options: you can Forward With Changes, Forward As Is, or Redirect.

Forward With Changes—Forwards the message with additional text you add to the message. Original text is denoted by quote marks.

Forward As Is—Forwards the message exactly as it appears to you, with your address listed in the "From" field.

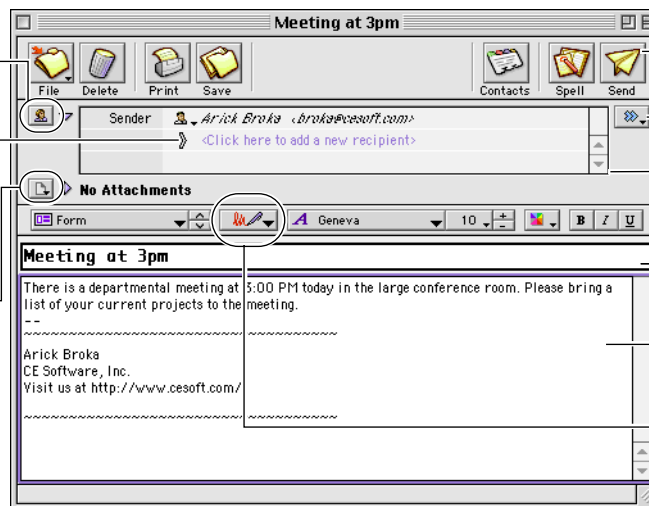
Redirect—Forwards the message exactly as it appears, with the original sender listed in the "From" field.

THE MESSAGE WINDOW THAT DISPLAYS WHEN YOU COMPOSE MAIL

Click the "Show Address Dialog" button to select addresses from an Address Book.

Click here to type the address of the message recipient. Press the return key when you finish typing the address.

Click the "Add or Save Attachment" button to enclose a file in your message. You can also drag and drop files over the address area of the message window to enclose them.



Button bar

Set message priority in the pop-up menu.

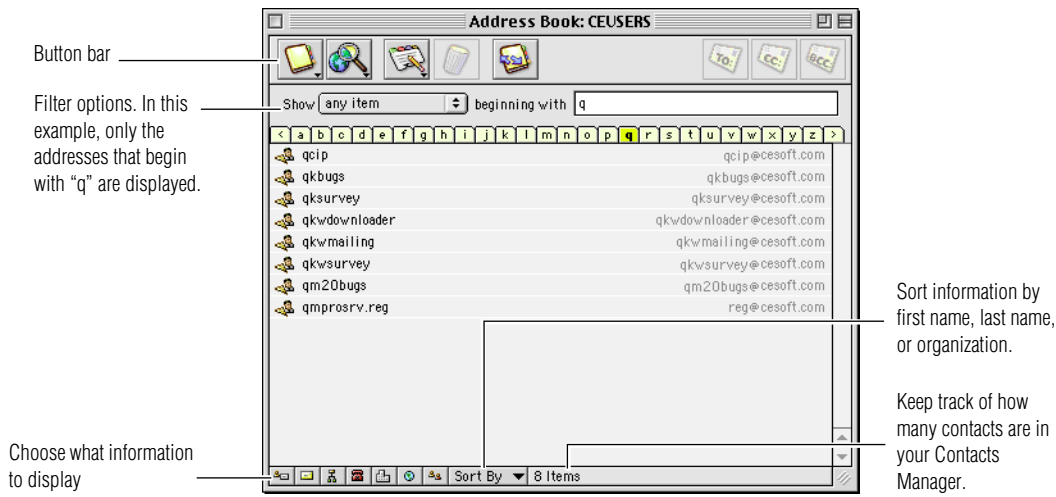
Size the address area of a message by clicking and dragging this line.

Subject line

Message body

Choose which of your signatures you want to use. Create signatures in the Preferences dialog.

THE CONTACTS MANAGER WINDOW



CREATING MESSAGES AND FOLDERS

When you want to create a new message, folder, contact, or group in QuickMail Pro, select the appropriate option in the File menu's New submenu. The centralized location of these options makes it easier to locate various menu items.

Addressing Messages

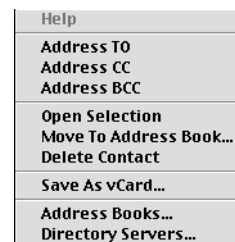
There are a variety of ways to address your QuickMail Pro messages:

- Click the Show Address Dialog button to display the Address Book dialog. Drag and drop an address from an address book to the To, CC, or BCC fields.
- Click in the field that states <click here to add a new recipient> and type the name or address of the message recipient. If you type the first few characters of the address and press the Return key, a dialog that lists possible address matches appears. Select an address and press the Return key again.
- Drag and drop a contact from the Contacts Manager to the address area of the Message window.

Using vCards

QuickMail Pro 2.0 can create data management items called vCards. A vCard is a collection of contact information that is recognized by any contact manager that supports vCards. When you have a contact that you want to send to another person:

1. Open the Contacts Manager.
2. Control-click the contact you want to send and select Save as vCard in the contextual menu that appears.



3. Choose where to save the vCard and click Save at the prompt. The vCard uses "vcf" as the filename suffix.
4. Drag the "vcf" file to the attachment area of a Message window to enclose it in your message. When the recipients of the message open it, they can save the contact to their personal contact manager.

Organizing Folders

Prior versions of QuickMail Pro kept you in the Mail Browser as you looked through your mail. However, in version 2.0 of QuickMail Pro, you can double-click any folder in the Message Browser and a secondary window opens (if the Behavior preference is set for this functionality). This new feature enables you to customize the way you work in the Message Browser. For example, you can use QuickMail Pro the way you did in previous versions or you can keep the Inbox open in a separate window. The flexibility of QuickMail Pro 2.0 gives you the power to choose how you want to view and organize your E-mail messages.

Additionally, QuickMail Pro folders can be nested within another folder. Drag and drop one folder over another one to create a hierarchical organization, just as you would do with folders in the Finder.

Using the Drafts Folder

The Drafts folder is available to hold messages that you haven't yet completed. For example if you are in the middle of typing a report and are called to a meeting, you can click the close box in the Message window and click **Save** at the prompt to store the unfinished message in the Drafts folder.

SETTING DEFAULT FONTS

There are now QuickMail Pro Preference settings that enable you to choose which fonts and styles are used in message you display and messages you compose. This feature offers yet another way to customize QuickMail Pro.

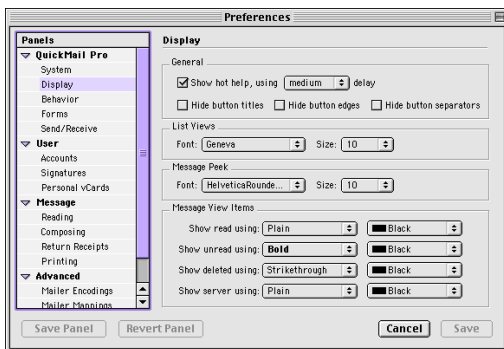


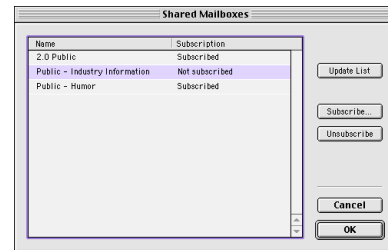
Figure 9: Set QuickMail Pro font preferences for the Mail Browser in the Display panel. Set font preferences for messages you send out in the Composing panel.

CONFIGURING SHARED MAILBOXES

Shared mailboxes are the equivalent of "public" mailboxes that several people can access. A shared mailbox can be set up for two people or an entire company, depending on your needs.

If your mail administrator has given you access to a shared mailbox, you must configure QuickMail Pro to check it.

1. Select **Shared Mailboxes** from the **Configure** menu. The **Shared Mailboxes** window appears.



2. Click the **Update List** button. If your mail administrator has given you access to any shared mailboxes, they appear in the list of shared mailboxes.
3. Select the shared mailbox to which you want to subscribe and click the **Subscribe** button.
4. Click **OK** when you are finished subscribing to mailboxes. When you open the Message Browser again, the shared mailbox appears in your main account folder.

When QuickMail Pro checks for new Inbox mail, it will also check for mail sent to your shared mailboxes.

UPDATING ADDRESS BOOKS

QuickMail Pro 2.0 is capable of updating your address books whenever you click the **Update Remote Address Book** button in the **Contacts Manager**. This feature alleviates the time and energy it takes for the mail administrator to send out address books as enclosures.

A "remote" address book is an address book that is stored on the mail server and that is updated by the mail system's directory services software.

To set up a remote address book:

1. Select **Address Books** from the **Configure** menu.
2. Click the **Add Remote** button in the **Address Books** window.

3. Select the Find remote address books on directory server option and click OK. The Add Remote Address Book window appears.

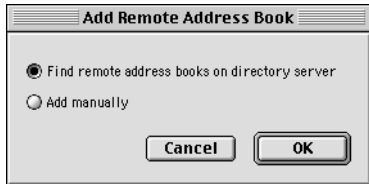


Figure 10: When you add a remote address book, you must choose whether or not to have QuickMail Pro automatically locate it.

4. Select your directory server from the Directory Server pop-up menu and click Find. The status bar displays the progress of your search. If QuickMail Pro locates remote address books that you have not yet subscribed to, they appear in the Found address books section of the dialog.

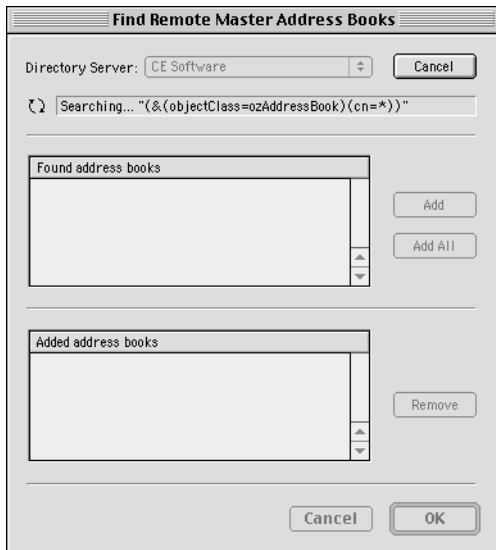


Figure 11: Locate the remote address books you want to use in the Find Remote Master Address Books window.

5. Select the remote address books you want to use and click Add. The selected address books appear in the Added address books section of the dialog.
6. Click OK when you are finished adding remote address books. The Address Books dialog appears with the remote address books listed.
7. Click OK in the Address Books dialog.

Now when you select a remote address book in the Contacts Manager and click the Update Remote Address Book button, you will have the most current list of user addresses from which to choose.

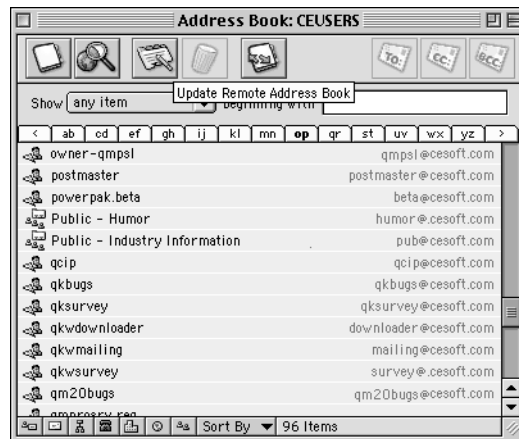


Figure 12: Click the Update Remote Address Book button to update your address book.

ADOPTING AN EXISTING ACCOUNT

If you want to check another E-mail account at the same time you check your work account, you must set up another account in QuickMail Pro.

To set up a second account:

1. Select Preferences from the Configure menu.
2. Open the Accounts panel.
3. Click the Adopt an Existing QuickMail Account button.
4. Choose an account to adopt and click the Adopt button.
5. Manually import and address books or groups you want to carry over from the existing account.

Setting Up New Accounts

If you get a new account for home use and you want to check it from work, follow these instructions.

1. Select Preferences from the Configure menu.
2. Select the Accounts panel from the User category in the Preferences window.
3. Click the Add button.
4. Provide your account information in the Add Account dialog. The information in the Account Name field is arbitrary, but all the other information (such as POP Host and SMTP Host) must exactly match the specifications provided by the mail administrator of your second account.

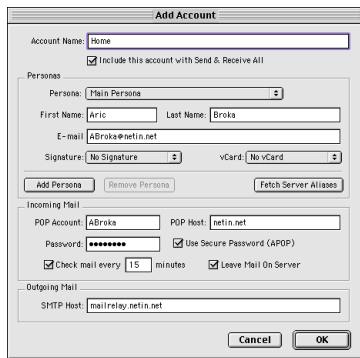

























Figure 13: Setting up a second account

5. Click OK in the Add Account dialog when you are finished. Your new account appears in the Accounts panel of the Preferences window.
6. Click Save to preserve your preferences. The next time you check for mail, QuickMail will check your main account and your secondary account in the same session.

CHAPTER 3 QUICKMAIL PRO ICONS

The table below shows the meaning of each icon in QuickMail Pro that does not offer a Hot Help explanation.

QuickMail Pro Icons	
 Read message	 Message in Outbox
 Unread message	 Flagged message
 Read message with attachment	 Bulk message priority
 Unread message stored on server	 Urgent message priority
 Read message stored on server	 Shared mailbox
 Return receipt	 Public contact in Contacts Manager
 Failure to send	 QuickMail encoding
 Partial message that exceeded size limit set in preferences	 Compatible encoding
 Partial message marked for retrieval	 Mac encoding
 Sent mail with attachment	 Windows encoding
 MailManager processing	 UNIX encoding
 Message in Sent Items folder	