SmartMail for Lotus Notes
**User Guide**

# SmartOffice®

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# Introduction

SmartMail for Lotus Notes is an add-on feature of SmartOffice® that integrates SmartOffice with Lotus Notes and creates a seamless interface between the two, enabling users to continue using Lotus Notes as their e-mail client. Users can compose Lotus Notes e-mail messages directly from SmartOffice and post messages to the SmartPad™. SmartMail for Lotus Notes requires either Lotus Notes version 6.x or higher. This document provides step-by-step instructions for the installation and use of SmartMail for Lotus Notes.

# User Roles and Licenses

1.  Log into SmartOffice as a System Admin user. The System Admin user can set up access rights for other offices, including SmartMail for Lotus Notes.
2.  Select **Office Settings** from the expanded **Office Setup** menu to open a list of available offices.
3.  Select the appropriate office and then click the **Licenses** tab.
4.  Select the **Lotus Notes Integration Module** option and then click the **Save** button to record the change.
5.  Select an appropriate user on the Users List Summary and then click the **User Roles/Licenses** tab**.**
6.  Select the **SmartMail for Lotus Notes** option in the E-mail Interface section and then click the **Save** button. The selected user now has the SmartMail for Lotus Notes role.
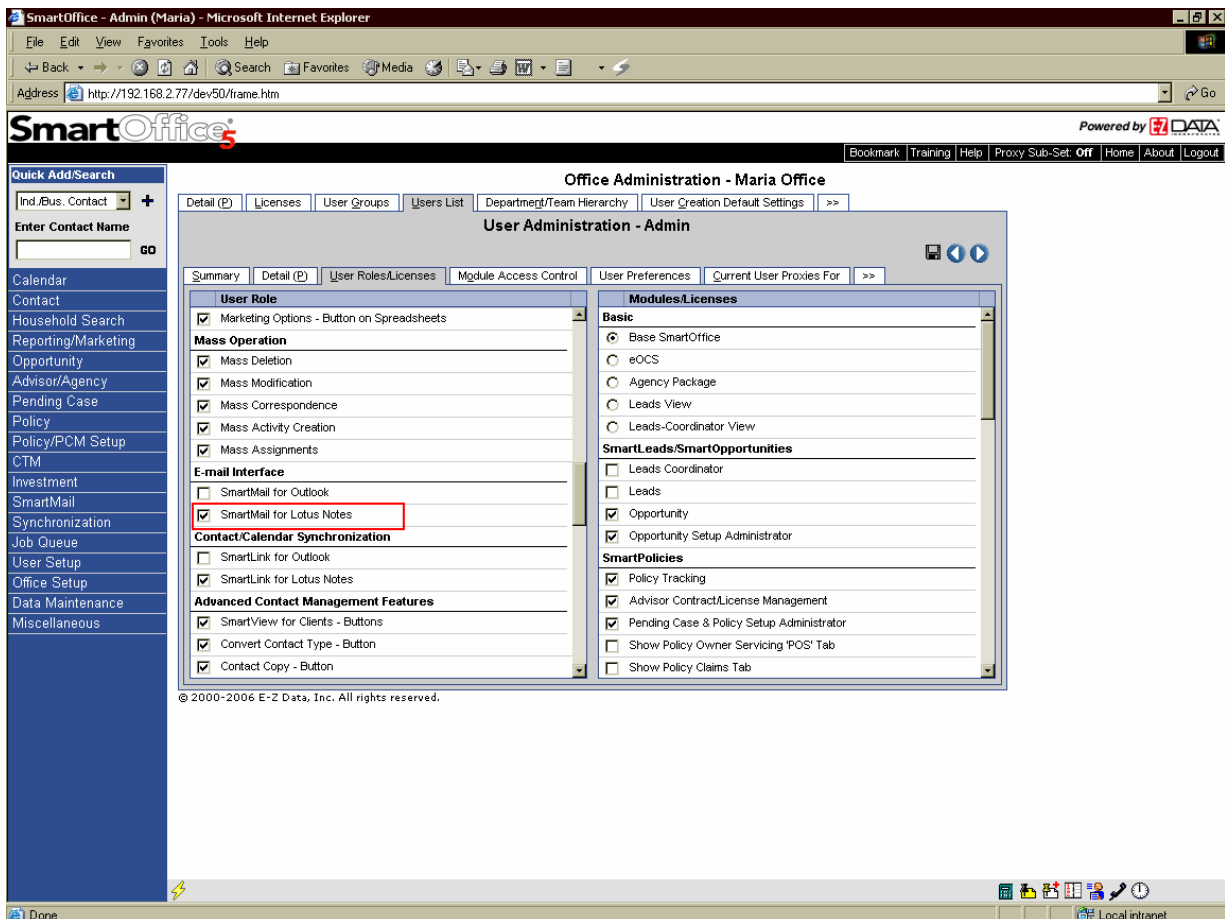
# Installing SmartMail for Lotus Notes

1. Make certain that Lotus Notes is not running prior to the installation of SmartMail.

2. From the side menu, click **User Setup** and then select **Installations** to open a list of additional components that can be installed from SmartOffice.
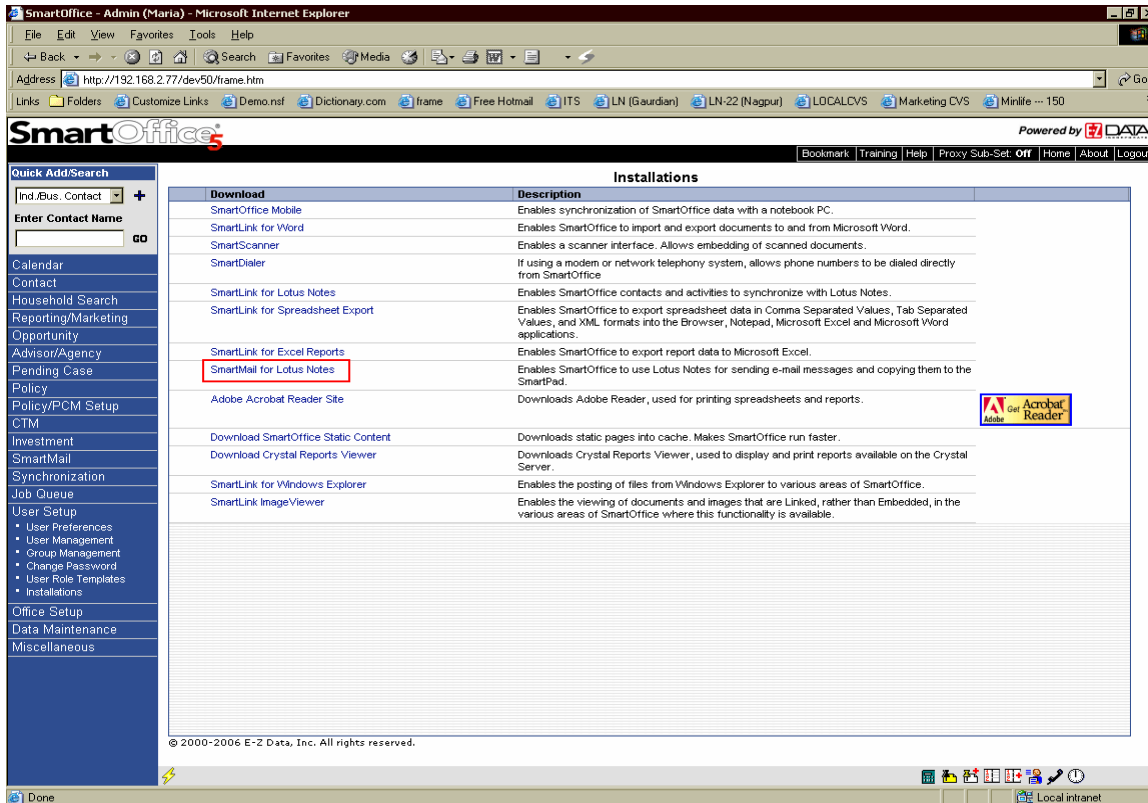


3. Click **SmartMail for Lotus Notes** to begin installation.
   **Note:** If a warning displays that asks for permission to download an application from E-Z Data, Inc., click the **Yes** button to enable the download to occur.

4. After the installation is complete, Lotus Notes will open automatically.
   **Note:** The Lotus Notes Mail template must be customized in order to work with SmartMail for Lotus Notes. This should be performed by the Lotus Notes Administrator prior to performing this installation.

# SmartPad Posting Options in Lotus Notes

From the **Actions** menu click **SmartPad Posting Options** to open the SmartPad Posting Options dialog box.
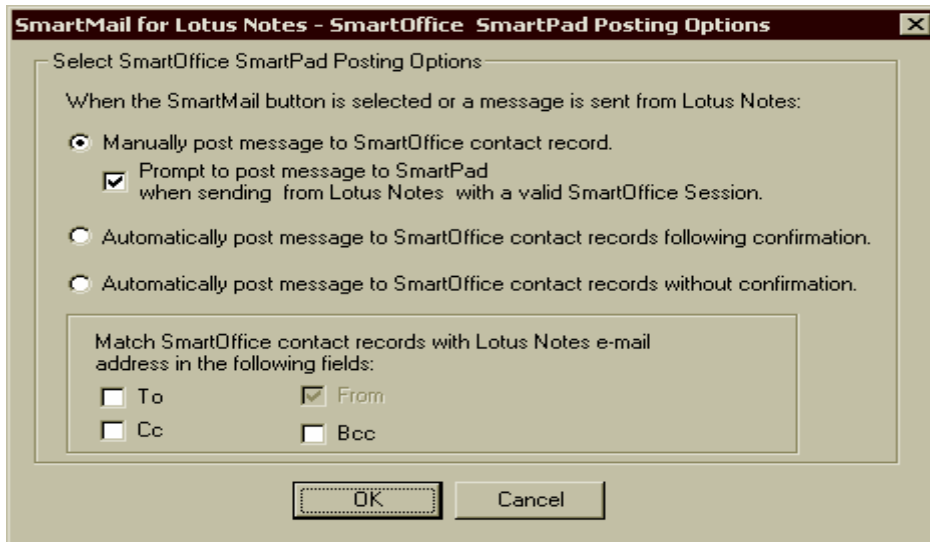


The SmartOffice SmartPad Posting Options dialog box provides the user with certain options to customize posting. The following options enable the user to post a composed message to SmartOffice either manually or automatically:

- **Manually Post message to SmartOffice contact record.**
  Selecting this option enables the user to post a message manually to the SmartPad of the appropriate contact(s) selected in the SmartMail for Lotus Notes dialog box in SmartOffice.

- **Prompt to post message to SmartPad when sending from Lotus Notes with a valid SmartOffice Session.**
  Selecting this option will prompt a message to the user whether the mail is to be posted to SmartOffice or not when the **Send** button is clicked.



- **Automatically post message to SmartOffice contact records following confirmation.**
  Selecting this option enables the user to post an e-mail automatically to the SmartPad of the SmartOffice contact(s) following the confirmation message box. The posting dialog box will not display in this case.

- **Automatically post message to SmartOffice contact records without confirmation.**
  Selecting this option enables the user to post an e-mail automatically to the SmartPad of the SmartOffice contact(s) without the confirmation message box. The posting dialog box will not display in this case.

- The **Match the SmartOffice contact records with the Lotus notes e-mail address in the To, Cc, Bcc, From fields** option enables the user to choose the e-mail address from the selected fields that need to be matched to the SmartOffice contact records.

# Posting Messages to the SmartPad from Lotus Notes

In Lotus Notes, either e-mail messages from the Inbox or Sent folders can be posted to SmartOffice, or e-mail messages can be posted when the Sent button is clicked.

1. Open the Inbox/Sent folder.
2. Select an existing e-mail to be posted to the SmartPad and then click the **SmartMail** button.
3. The Request Mail dialog box displays with the list of e-mail addresses of the recipients matching the SmartOffice contacts.
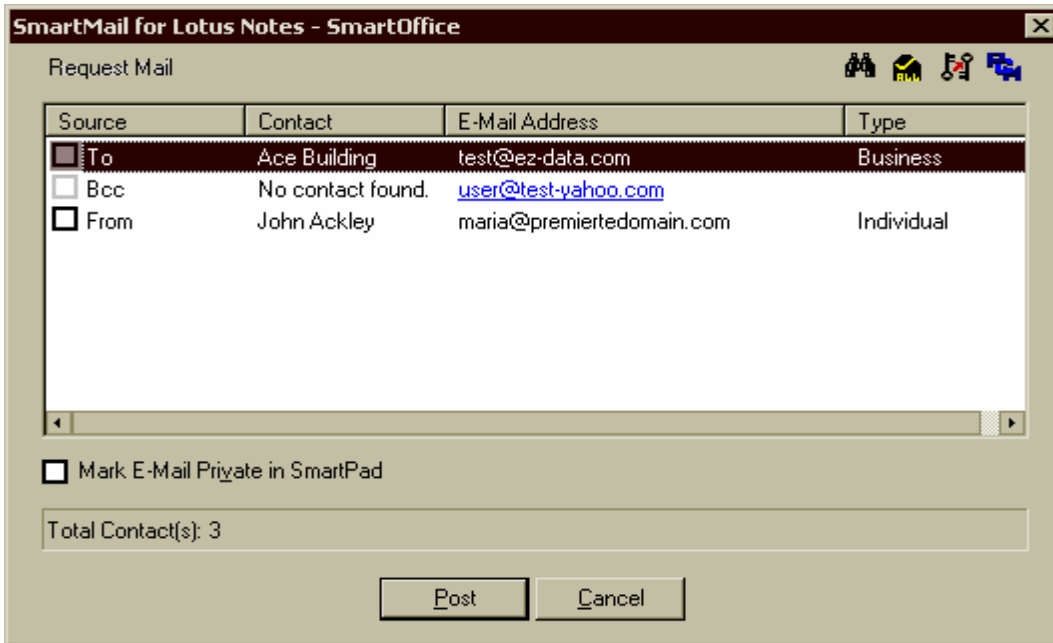


4. To post the selected e-mail to additional contacts, click the **Find Contact(s)** button.

5. Enter the appropriate search criteria to locate a contact or business record for posting and then click the **Search** button.



6. Select any additional contact(s) for posting and then click the **OK** button.



**Note:** The additional contact selected displays on top and the Source displays as SmartOffice.
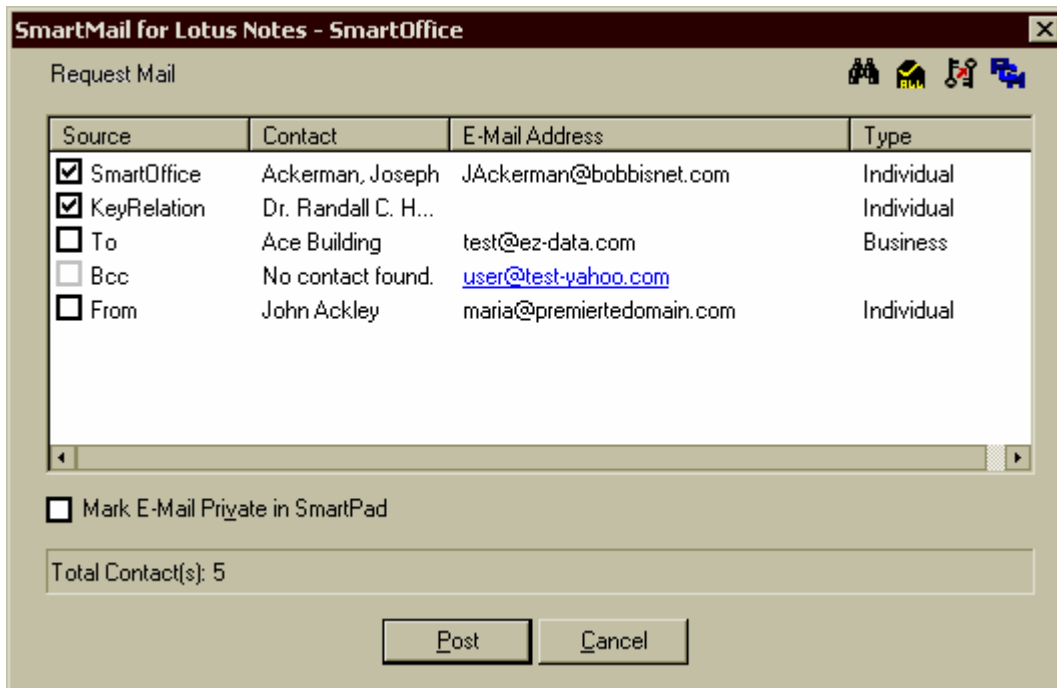
7. To post e-mail to a contact's Key Relations, select the contact and then click the **Key Relations** button.
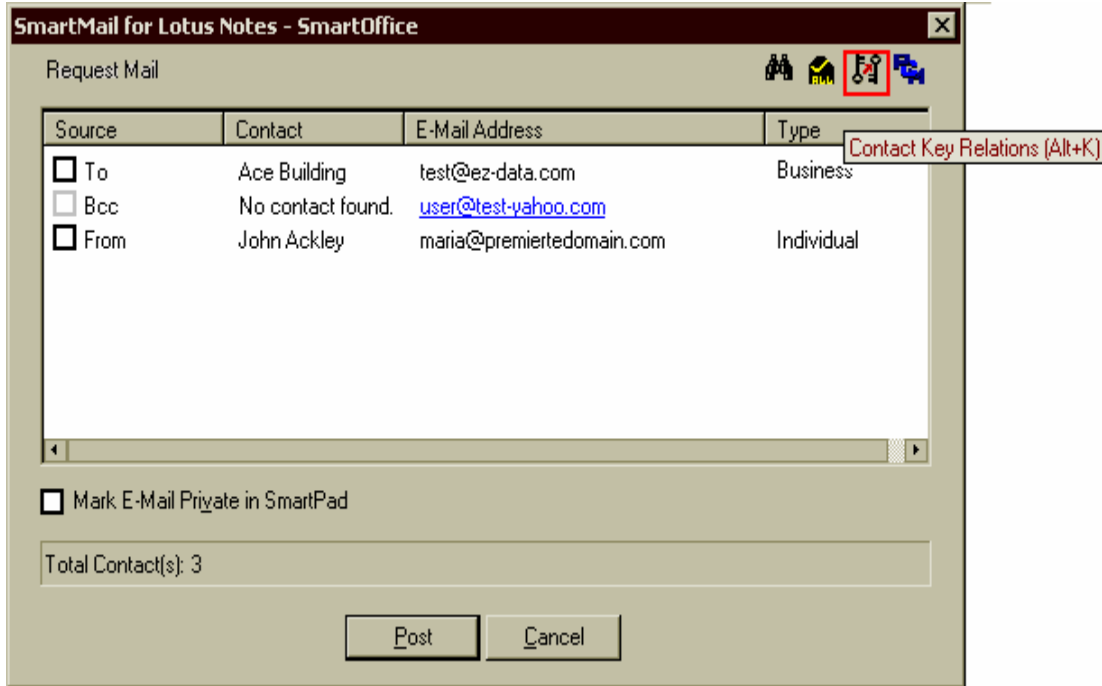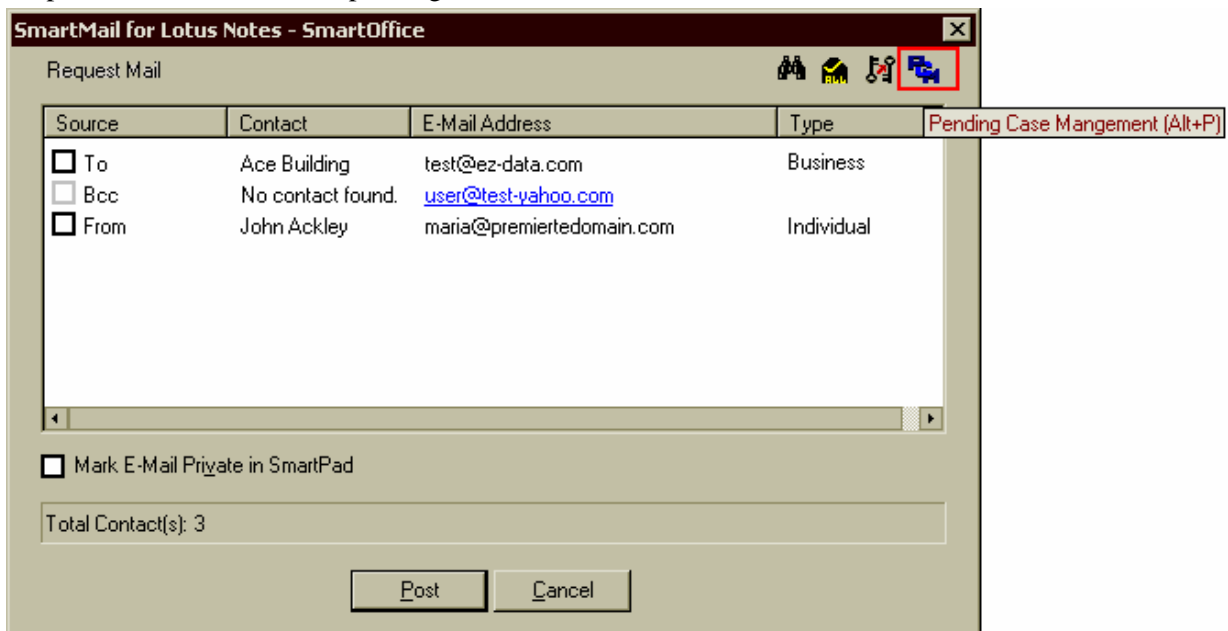


8. Select the Key Relation(s) for posting and then click the **OK** button.
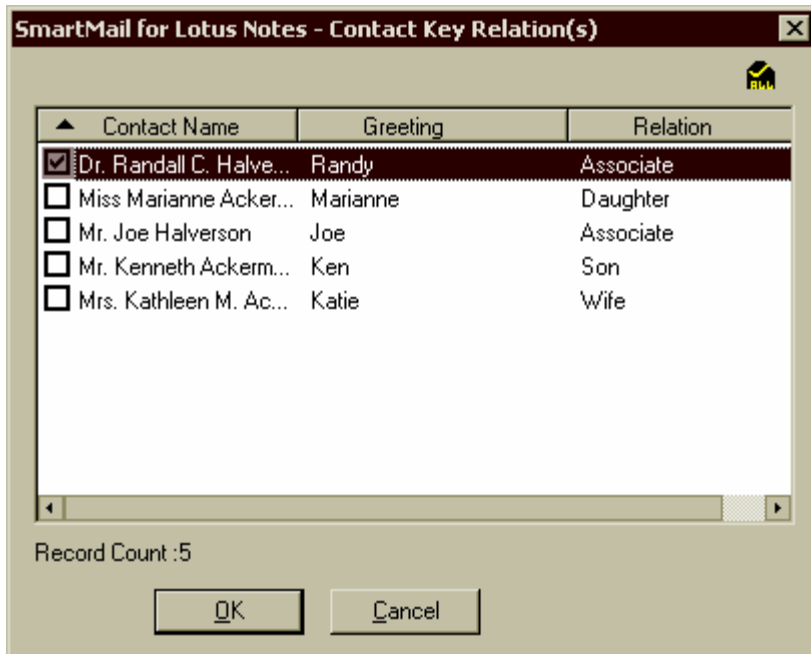
9. The selected Key Relation displays in the Request Mail dialog box with the Source as KeyRelation.
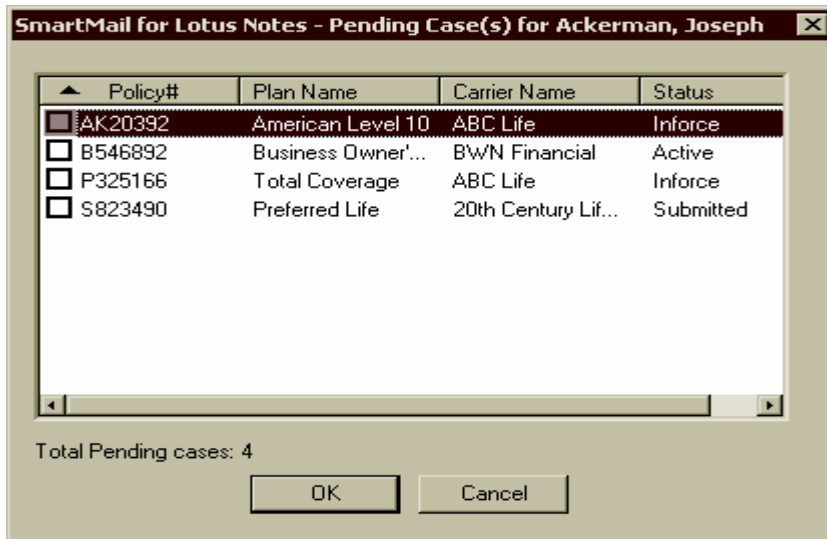


10. To post e-mail to a contact's pending case, select the contact and then click the **PCM** button.



**Note**: The PCM button will not be available if the user currently logged into SmartOffice does not have the appropriate user rights.

11. Select the Pending Case for posting and then click the **OK** button.



**Note:** Only one pending case can be selected for posting. The mail will be posted to the Policy Notes and the Activity E-Mail section for the Policy/Pending case.

12. Select the **Mark E-Mail Private in SmartPad** option to mark the e-mail as private in the SmartPad. Click the **Post** button to copy the e-mail to the SmartPad of the selected (checked) contacts, their Key Relation(s) and pending cases (if selected).
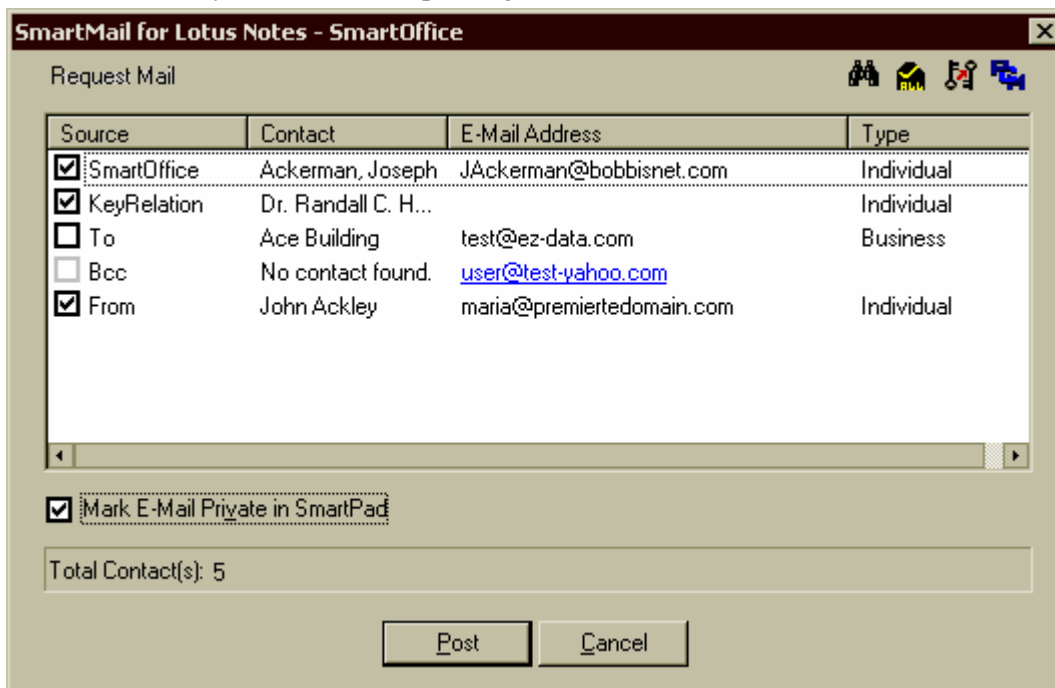


**Note**: The **Mark E-Mail Private in SmartPad** option will be disabled if the user logged into SmartOffice does not have the **Record Privacy** rights or if the Enterprise View is turned on.

13. In the SmartOffice SmartPad, the user can access the original e-mail using the Open Link button. (Customize the layout to display the Open Link column, if necessary).

# Posting Messages to the SmartPad from SmartOffice

1.  In SmartOffice, open the Details tab of the appropriate contact and then click the **Compose E-mail** button.
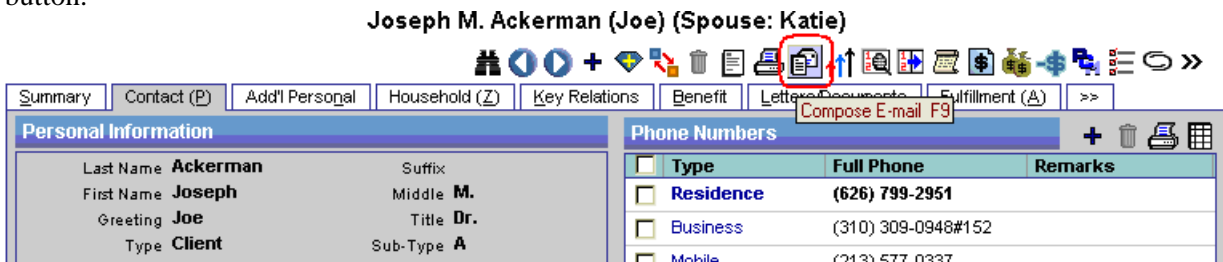


2.  Determine if the message being sent is to the selected contact or to the selected SmartOffice user(s) regarding the selected contact.



**Note:** When the "Is this message regarding the current contact?" opton is selected, the current contact will not be the recipient of the mail. Only the e-mail address of the users will display in the compose window.

3.  The Lotus Notes New Memo tab displays with the e-mail addresses of the recipients of the e-mail.
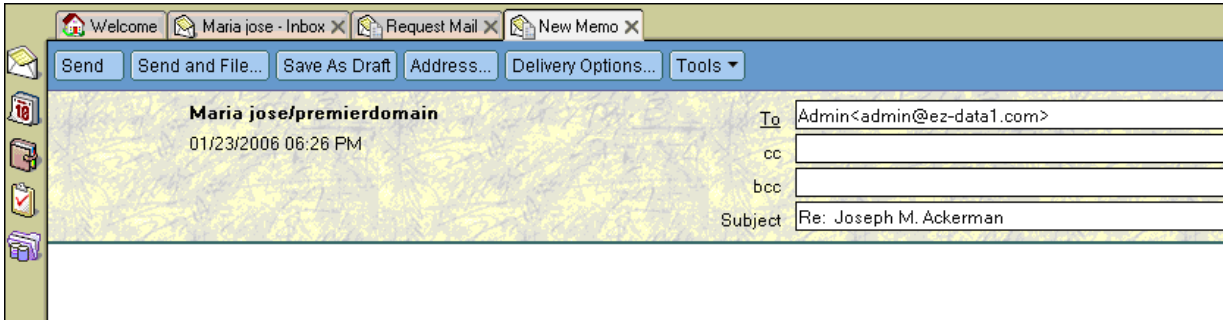


**Note:** Any e-mail message composed from Lotus Notes can be posted to the SmartPad while the user is logged into SmartOffice. When the user clicks the **Send** button in Lotus Notes, a "Would you like to post the e-mail to SmartPad™?" message displays. Select **Yes** to open the Request Mail dialog box listing the SmartOffice contacts and recipients' e-mail addresses.

4.  The e-mail is posted to the SmartPad of the selected contact(s) in SmartOffice.

# Posting Messages to Policies/Pending Cases from SmartOffice

1.  In SmartOffice, open the Details tab of the appropriate Policy or Pending Case and then click the **Compose E-mail** button.
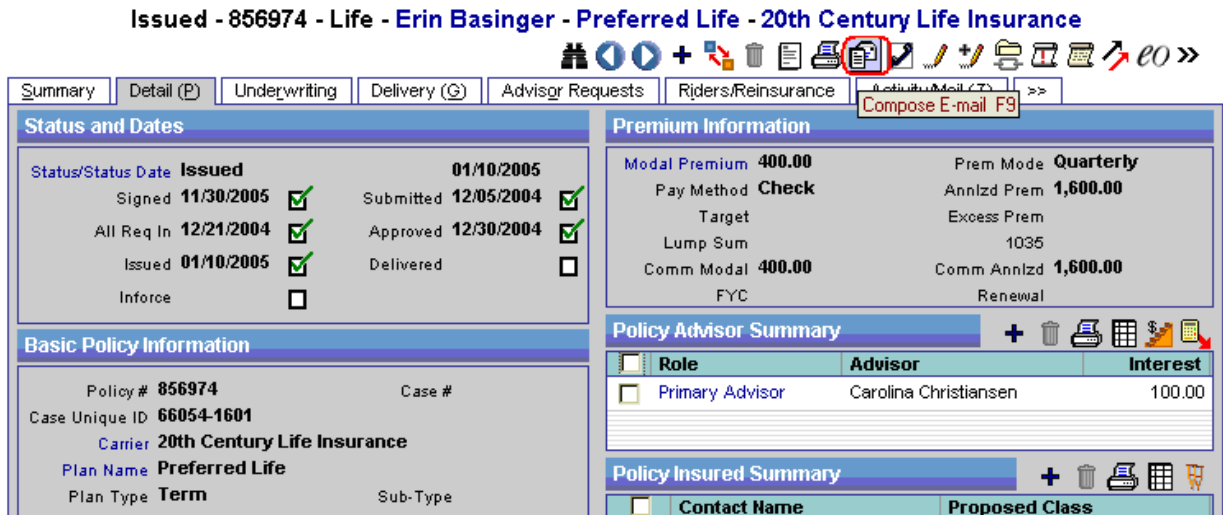


**Note:** E-mail can be composed from only one Policy or Pending Case at a time.

2. Determine if the message being sent is to the selected contact(s) related to the current case/policy or to the selected SmartOffice user(s) regarding the current case/policy.
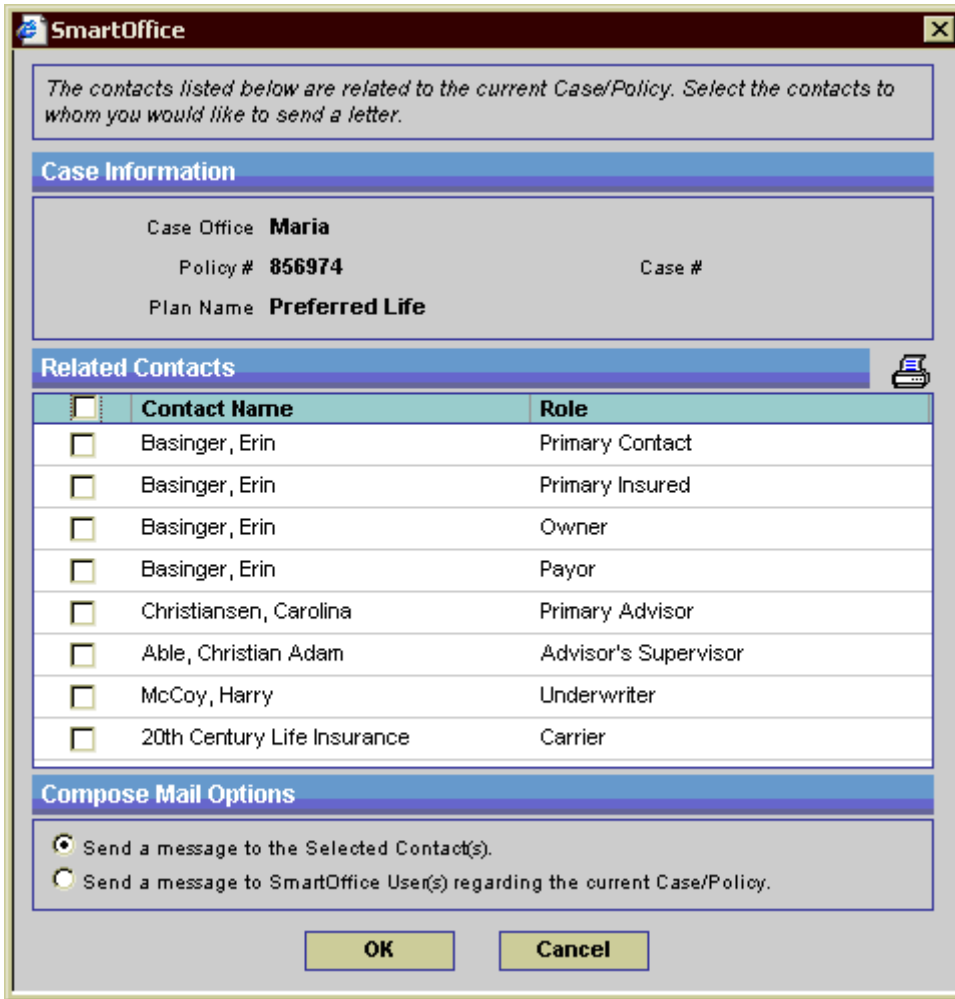


Note: When the "Send a message to SmartOffice User(s) regarding the current Case/Policy" is selected, the current contact will not be the recipient of the e-mail. Only the e-mail addresses of the users will display in the compose window.

3. The Lotus Notes New Memo tab displays with the e-mail addresses of the e-mail recipients. When the e-mail is sent, it will be posted to the Activity Mail tab and the Policy Notes of the selected recipient(s) in SmartOffice automatically.