Cheat Sheet - LeanMail Plan

LeanMail

Plan Toolbar

LeanMail Options

Move Forward

RapidReply

Read Later

Camera button, for sending snowmails

Project folders

Move to Project folder

Open Project folder

LeanMail project folders

Avtivate Project folders on the Plan tab in options

Plan (0) Today (20) All (20)

LeanMail

Plan view   Today view   All view

Views

Plan view
- Start here
- Shows emails that are missing next action and When dates

Plan (0) Today (20) All (20)

LeanMail

All view
- Shows all the emails in your inbox

Today view
- Shows emails due today

Plan Buttons

Move emails forward 1 day

2 days
3 days
4 days
5 days
1 week
2 weeks
1 month
3 months
6 months
All Normal to tomorrow

Move emails forward multiple days

RapidReply Button

Choose from the list to send a template answer

Please call me to discuss

UNSUBSCRIBE

Try LeanMail

Customize RapidReply

Click to customize your emails templates
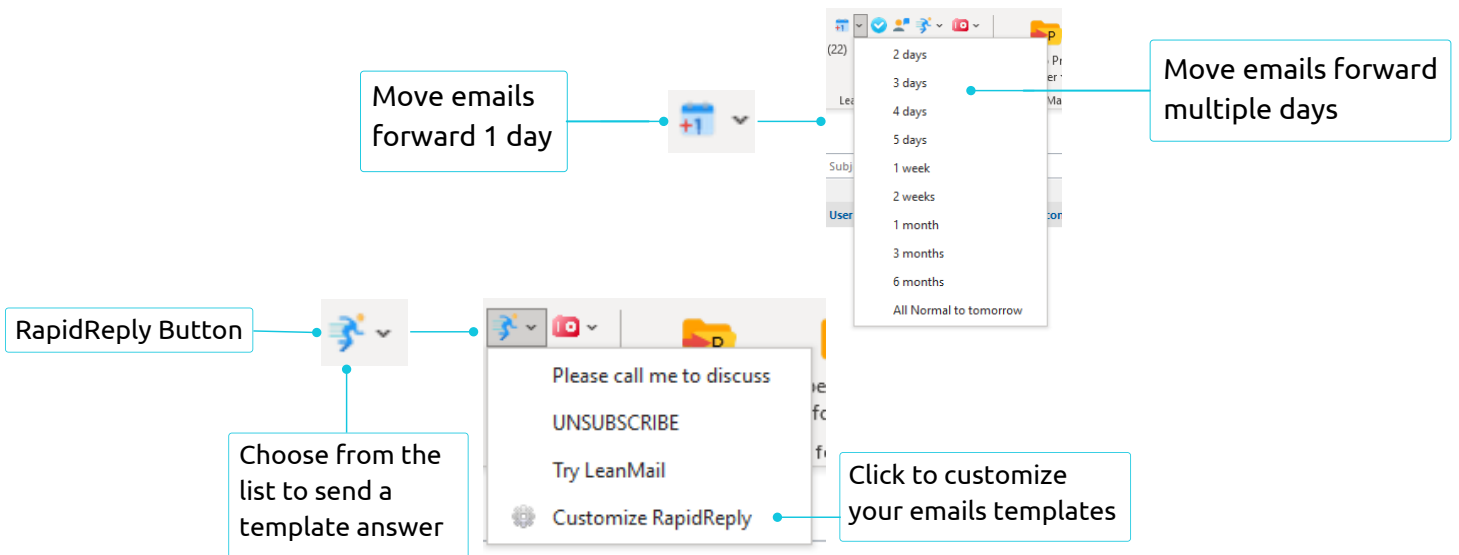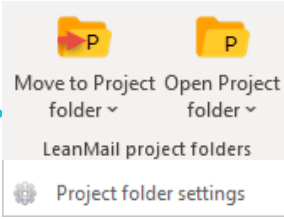
How to use LeanMail Plan

1. Begin by clicking on the Plan view in the LeanMail toolbar.
2. Starting from the top, work your way to the bottom by answering or taking action on any emails that take less than two minutes, or by entering a Next action and a When date. Use your tab key to navigate across the columns.
3. The Plan view will automatically change to the Today view once the last email has been processed.
4. In the Today view, ensure that you don't have too many items due today, and that all your Next actions are clear.
5. Process your emails from the Today view.
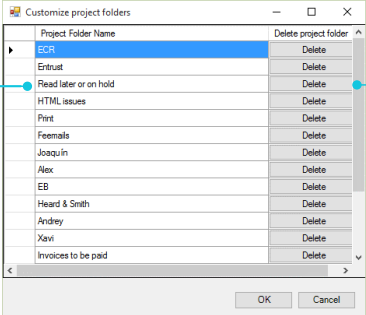6. Repeat two to five times per day depending on your job function.

Project folder

How to create a Project folder

Create a new Project folder by clicking on one of the folders and the Project folder setting

Move to Project folder
Open Project folder

LeanMail project folders

Project folder settings
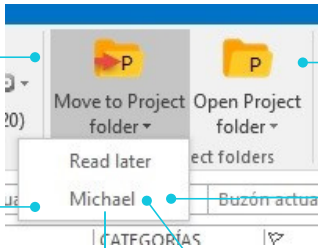
Project folder name

Delete Project folder

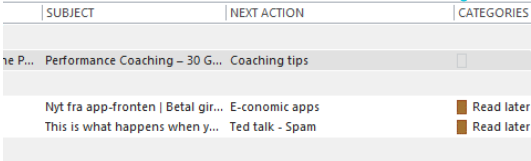**Note:** Max. 16 Project folders

Using Project folder

Adding emails:
Select the email, then click on the Move to Project folder button

Find the emails:
Click on the Open Project folder button

Move to Project folder
Open Project folder

Read later

Choose Project folder

Michael

Choose Project Folder

SUBJECT	NEXT ACTION	CATEGORIES
he P... Performance Coaching – 30 G...	Coaching tips	
Nyt fra app-fronten	Betal gir...	E-conomic apps	Read later
This is what happens when y...	Ted talk - Spam	Read later

Note: The Project folder category is automatically added to the email when it is added to the Project folder.

How to use Project folders

Project folders are for emails without concrete deadlines. They are not archive folders because they contain emails that need your action.

Add emails to Projects by clicking on Move to Project Folder. Locate emails by clicking on Open Project Folder.

Project folders are great for emails you want to read later but that don't have deadlines as well as for teams and projects you work on regularly.

Don't use Project Folders for anything that has a firm deadline; Instead, plan it in your inbox.