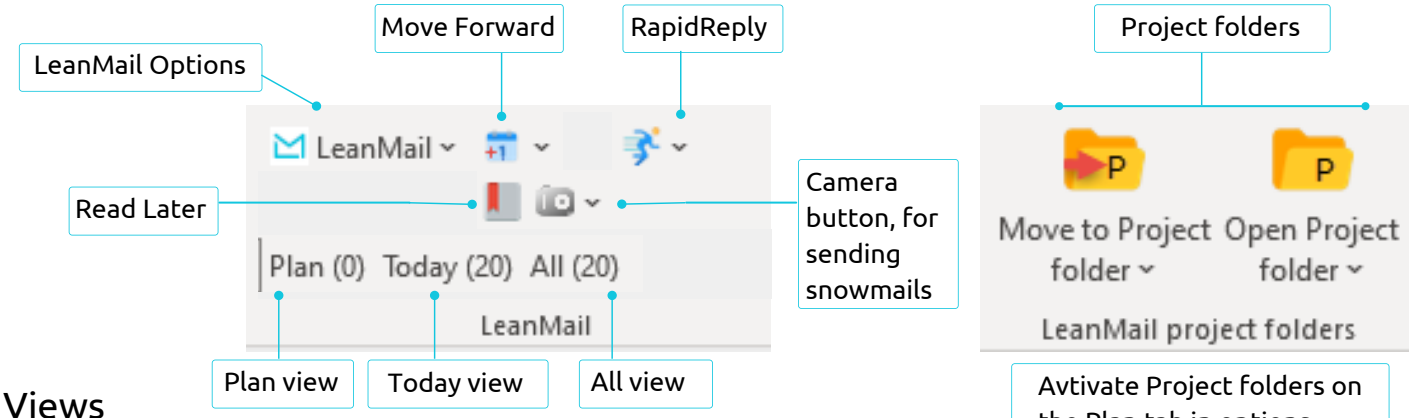
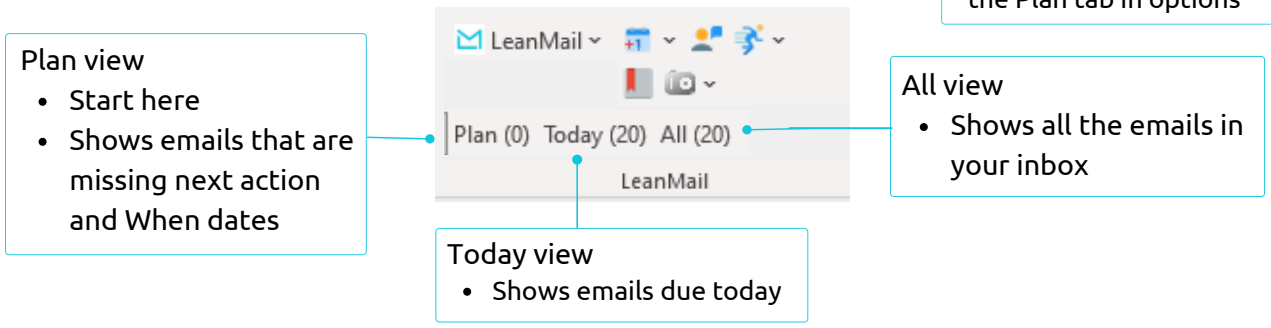
Cheat Sheet - LeanMail Plan

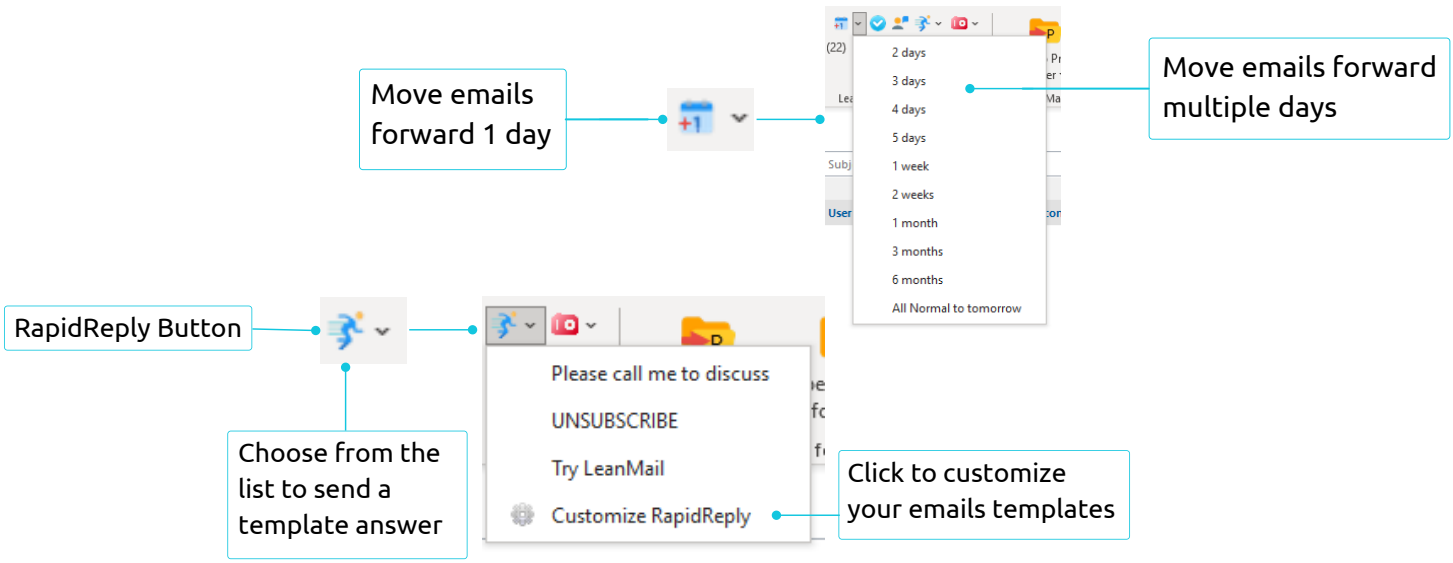
Plan Toolbar



Views



Plan Buttons



How to use LeanMail Plan

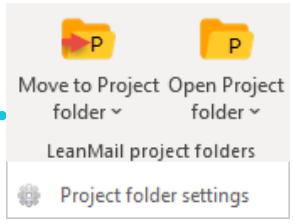
1. Begin by clicking on the Plan view in the LeanMail toolbar.
2. Starting from the top, work your way to the bottom by answering or taking action on any emails that take less than two minutes, or by entering a Next action and a When date. Use your tab key to navigate across the columns.
3. The Plan 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.

Cheat Sheet - LeanMail Plan

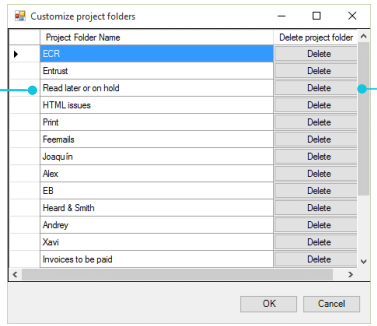
Project folder

How to create a Project folder

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



Project folder name

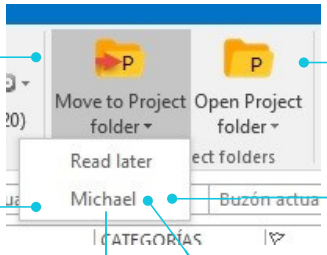


Delete Project folder

Note: Max. 16 Project folders

Using Project folder

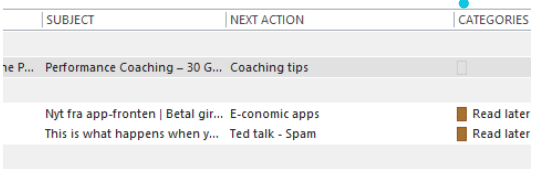
Adding emails:
Select the email, then click on the Move to Project folder button



Find the emails:
Click on the Open Project folder button

Choose Project folder

Choose Project Folder



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.