Cheat Sheet - LeanMail Plan

Plan Toolbar

LeanMail Options

Move Forward

RapidReply

Project folders

Read Later

Camera button, for sending snowmails

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

Move to Project folder

Open Project folder

LeanMail project folders

Views

Plan view
Today view
All view

Avtivate Project folders on the Plan tab in options

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

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

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

Please call me to discuss

UNSUBSCRIBE

Try LeanMail

Customize RapidReply

Choose from the list to send a template answer

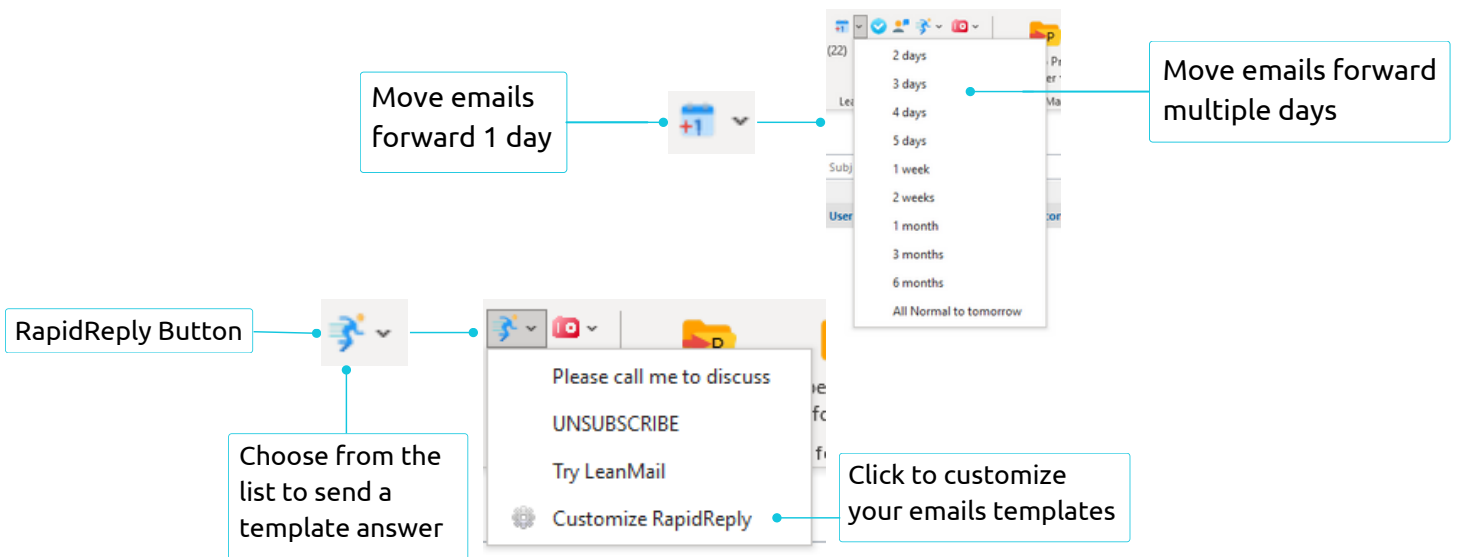Click to customize your emails templates

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How to use LeanMail Plan

1. Select the Plan view if it is not already selected
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. Enter a Next action and a When date on those that take more time. 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 (i.e. more than 15-20), and that all your Next actions are clear - meaning you don't have to re-read the email to know what to do next.
5. Process your emails from the Today view. Repeat two to five times per day depending on your job function.
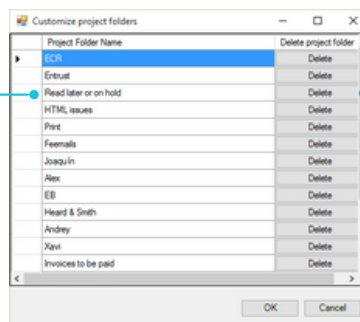
Project folder

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

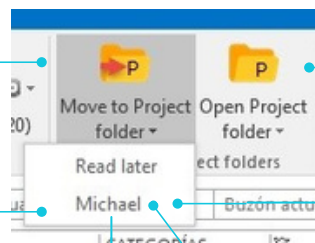Project folder settings
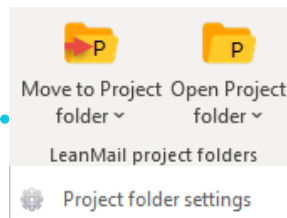
Project folder name

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

Michael

Choose Project folder

Choose Project Folder

SUBJECT	NEXT ACTION	CATEGORIES
ne 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.