Cheat Sheet - LeanMail Shared Inbox

LeanMail

Shared Inbox Toolbar

LeanMail Options

Camera button

Customer rating buttons

Delete button

Category button

Collapse all groups button

Shared Inbox Views
(see views)

All mails ⌄
Shared Inbox All
Shared Inbox Today
LeanMail shared inbox

Custom wiews

Shared Inbox Buttons

Camera button - Snowmail, print screen and help

Customer raiting buttons - for prioritizing senders

Double Chevron - Collapse all groups

Categories - Open master list of categories

Delete - Same as functionality delete from your keyboard
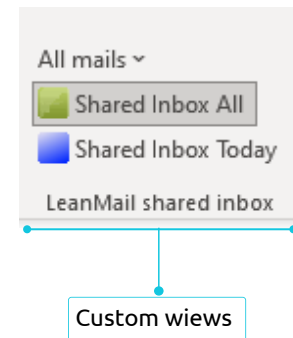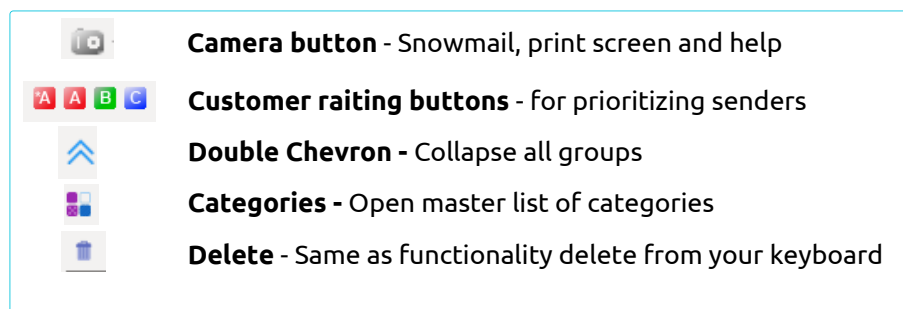
How to use Shared Inbox

With Manager oversight

- Manager:
1. Filter mails by All unassigned, Shared Inbox All and delete, archive or assign a Responsible, and possibly a Customer priority, Next Action and When date to each email. This can also be delegated to the responsible.
2. Filter by All assigned and review workload, making any changes you like and using drag and drop to redistribute responsibles.

- Team member:
1. Filter by "Just me".
2. Add Next Actions and When dates where incomplete.
3. Filter by Shared Inbox Today to see all emails due today.

Without manager oversight

- Team member:
1. Filter mails by Unassigned.
2. Delete, archive or assign the appropriate emails to yourself as you review them (and to others if possible.)
3. Assign customer priorities, Next actions and due dates.
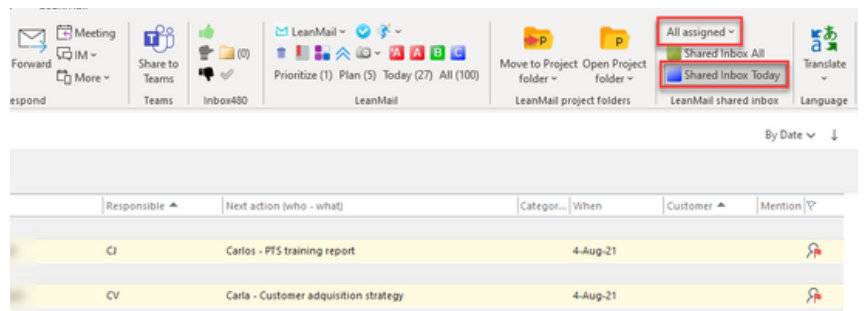4. Filter by Shared Inbox Today and complete your tasks.

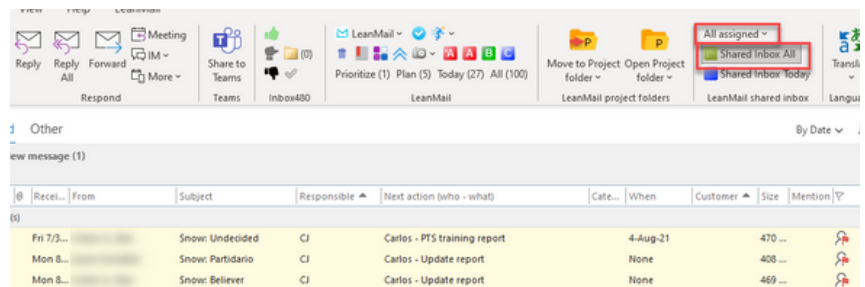More LeanMail info   E-Learning   Free Trial FREE   YouTube

Views

All assigned – Just today
- See everything assigned just for today
- Show overdue mails
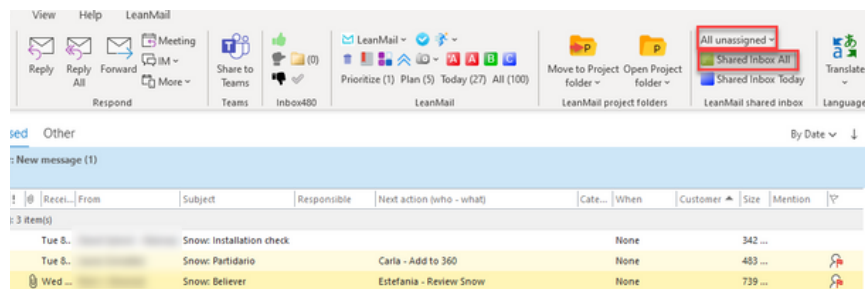- Ordered by responsible then by customer rate

All assigned
- See anything assigned
- Sorted by responsible then by date received with the oldest emails on top
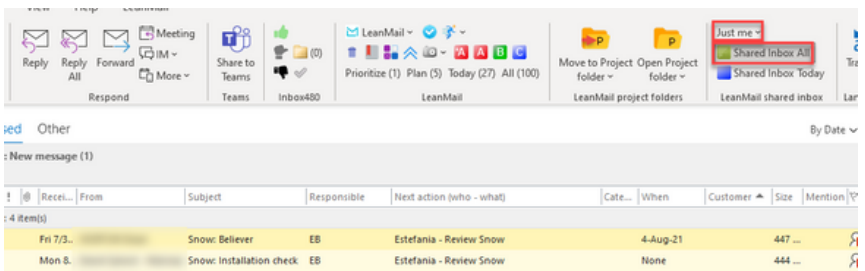

All unassigned
- See everything unassigned
- Sorted by date received then by next

All view – Just me
- "Just me" is your personal view
- Ordered by category

Today view – Just me
- See the emails for today for a particular responsible
- Ordered by customer rating