



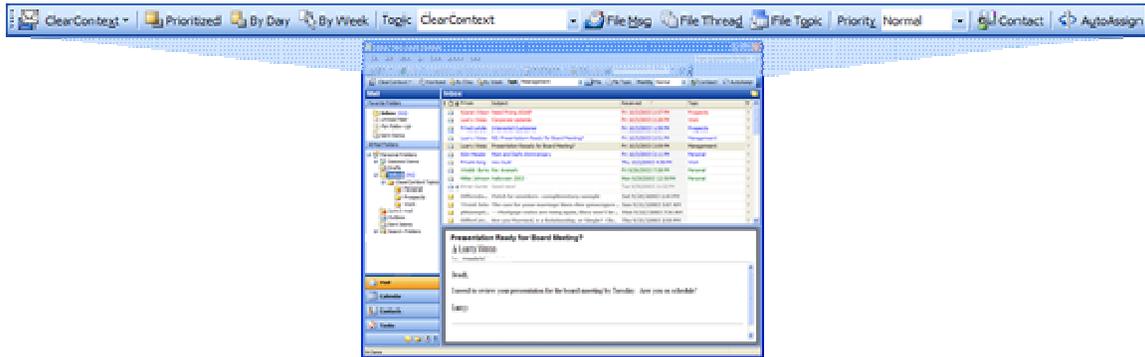
v1.1 User Guide

Table of Contents

Overview	3
Usage Tips	4
Contact Priority: Making the Most of Your Valued Contacts	5
Contact Analysis.....	5
Manual Priority Adjustment.....	5
ClearContext Contacts Folder	6
Contact Prioritization Tips.....	6
Topics: Managing the Inbox via Automated Filing	7
Assigning Topics	7
Saving Sent Messages.....	7
Filing Messages.....	8
Configuring Topic Folder Location.....	8
Topic Management Tips	9
AutoAssign: Creating Rules to Automatically Organize Email	10
Types of AutoAssign Rules	10
AutoAssign Actions.....	11
Managing Multiple Rules	11
AutoAssign Tips.....	11
Message Priority: Using the Inbox as a To Do List	12
To Do Lists	12
Scoring Adjustment: Personalizing Email Prioritization	13
Known Addresses.....	13
Message & Thread Priority	13
Thread Participation	13
Message Directness.....	14
Scoring Tips	14
Advanced View Management: Customizing Inbox Views	15
Factory Installed Views.....	15
View Restoration	15
View Configuration	16
Downloadable Views	16
ClearContext Menus, Options, & Preferences	17
ClearContext Menu Bar.....	17
ClearContext Options	17
ClearContext Preferences	17
Additional Resources	18

Overview

After installing ClearContext™ Inbox Manager for Microsoft Outlook®, you will have three new Views created in your Inbox and a ClearContext toolbar in both your Outlook inbox and message windows. These toolbars allow you to select views and manage the emails in your Inbox. For a summary of ClearContext capabilities, see the Overview page on www.clearcontext.com.



The ClearContext Inbox

Immediately following setup, you will see that ClearContext is automatically prioritizing and color-coding your email based on several key factors, including sender, message priority, thread participation, and email directness. Automated features include:

- **Inbox prioritization** - ClearContext uses contact and email message information to prioritize your emails; moving the most important email to the top of the inbox and placing junk/spam messages at the bottom.
- **Color Coding** - Customized ClearContext views group messages with similar priority scores within the inbox and assign a color code based on the priority. The default *Prioritized* view organizes all email in the inbox based purely on the priority of messages. *By Day* and *By Week* views allow the user to view the prioritized email sorted into groups by day or by week. For more information, see the Advanced View Management section of this guide.
- **Thread Organization** - All of the responses in a thread (or "conversation") of emails with the same subject are placed next to each other in your Microsoft Outlook Inbox, allowing quick review all email on a given subject.

In addition, you will find that ClearContext has installed toolbars in the Inbox, email message windows, and contact records to provide greater control over email prioritization and filing automation. The guide below will help you take advantage of these more advanced features. For additional information on ways to use ClearContext, see our example case studies on www.clearcontext.com. Finally, our whitepaper, *Designing a More Effective Inbox* (also available on the website), gives a detailed description of our features and patent pending prioritization processes.

Usage Tips

At the end of each section of this guide, we provide tips on utilizing ClearContext's advanced features. We encourage you to review and implement many of these suggestions to maximize the value you gain from the application. Here are a few tips to get you started:

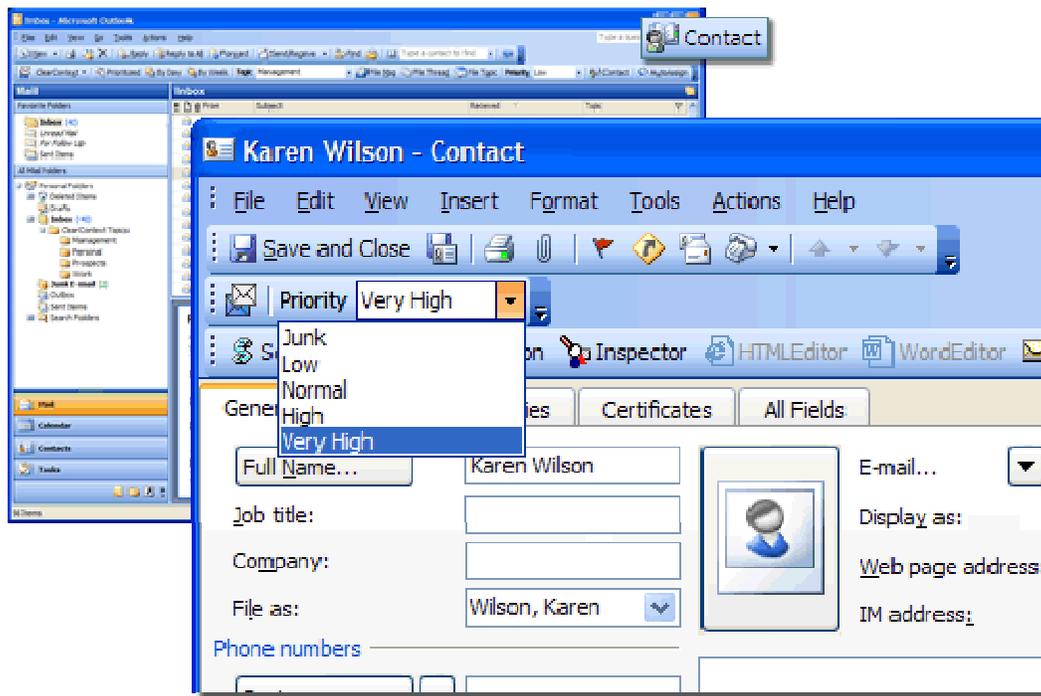
Modify Contact Priority: ClearContext prioritizes your inbox based on several key factors, including contact priority. To see the impact contact priorities have on email placement, select an email message from an important email address. Click the Contact button on the ClearContext Inbox toolbar and adjust the contact's priority via the ClearContext Contact toolbar. Select OK when asked to rescore. Inbox prioritization will automatically be adjusted to reflect the contact's new priority.

Modify Message Priority: Highlight a message located towards the middle of the inbox that is important to you. Manually adjust the message priority to *Very High* via the ClearContext Inbox toolbar. The message's position and color is adjusted to reflect the higher importance you have given it.

Latest User Guide: The latest version of this User Guide is located on the Additional Information page at www.clearcontext.com.

Contact Priority: Making the Most of Your Valued Contacts

In the contact analysis process performed during setup, ClearContext's patent pending prioritization algorithm automatically identifies those contacts that are most important to you and assigns a priority. ClearContext uses this **contact priority** to move emails from your most valued contacts to the top of your inbox. You can also manually assign or modify the contact priority within the contact record to further customize the placement of email based on sender.



Contact Analysis

At initial startup, ClearContext analyzes email history to determine email addresses from which the user sends and receives the most email. Email addresses are then ranked according to frequency of interaction, giving the user an accurate picture of his/her most important email contacts. This priority assignment is used as one factor in scoring and color coding the inbox. Though given the option to postpone this analysis at startup, it is important that the contact analysis is completed to fully utilize ClearContext's ability to prioritize email.

Manual Priority Adjustment

After analysis of contacts, each contact record in the user's personal address book is assigned a priority level of *Very High*, *High*, or *Normal*. To manually adjust contact priority (and further refine scoring of the inbox), open a contact record and select the desired value from the contact priority drop down menu on the ClearContext Contact toolbar. To open a contact record, either select the contact from within the Contacts folder or click the ClearContext Contact button to jump to the contact record for the currently selected email. If the sender doesn't have a pre-existing Contact record, clicking the ClearContext contact button will give you the option of creating one.

ClearContext Contacts Folder

During analysis, ClearContext will identify email addresses that exist in email history, but do not have a corresponding contact record. Those newly found email addresses with high email message volume will be automatically added to the ClearContext Contacts folder, a subfolder of the user's contacts. Exchange users should ensure that this contacts folder is available offline to enable accurate scoring.

Contact Prioritization Tips

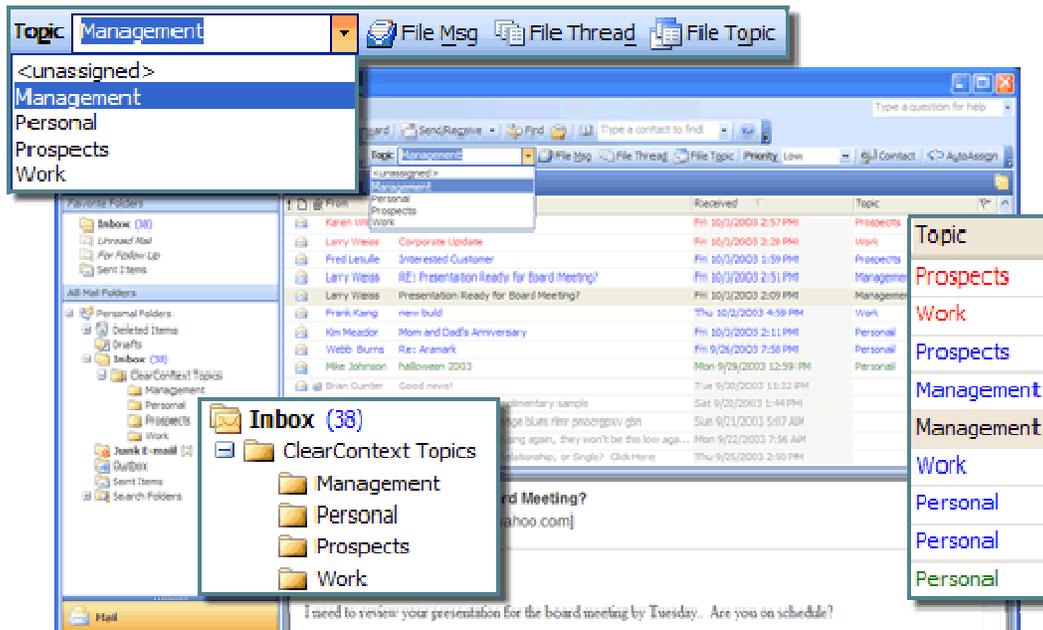
Re-Run Analysis: The contact analysis process can be re-run at any time via *Tools > Options > ClearContext > Analyze Contacts*. Contact records will retain manually set priorities, but new priorities will be assigned based on the latest email history to all other contact records.

Email Archives: The more data available to analyze, the more accurate ClearContext's rank of email addresses. If using multiple Outlook data stores to archive email, add these files to Outlook (via *File > Open > Outlook Data File*) and re-run analysis.

Junk Mail: Manually adjust the contact priority to *Low* or *Junk* for those contacts that send unimportant email. Future messages will appear at the bottom of the inbox in grey.

Topics: Managing the Inbox via Automated Filing

ClearContext automates the filing process, making it easier to identify and store messages. Each email message may be assigned a **Topic** of the user's choosing via a ClearContext toolbar. The topic name will appear in the Inbox when using a ClearContext custom view. All future email in that email thread (or "conversation") will be automatically assigned this topic name. The *File Msg*, *File Thread*, and *File Topic* buttons allow the user to automatically move email messages with assigned topics from the inbox to topic folders created to store messages in an organized manner. In addition, the user has the option to automatically save sent messages in these topic folders. Here's how all this works.

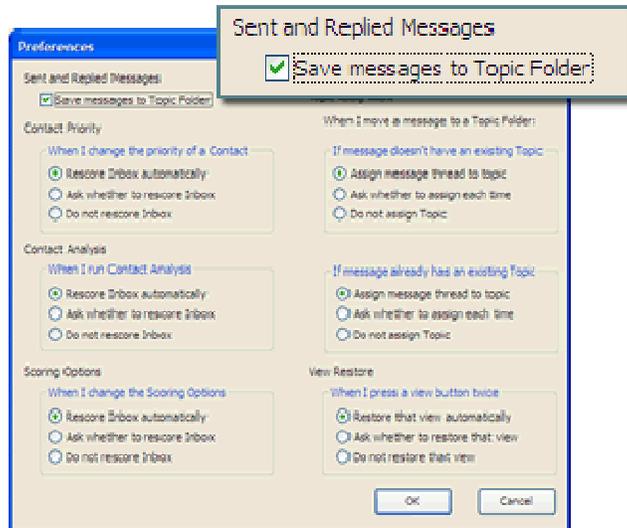


Assigning Topics

Topics are assigned via the topic drop down menu in the ClearContext toolbars, located in the Inbox and in open messages. (Please note that utilizing Microsoft Word for message editing will disable the ClearContext toolbar in open messages, including new messages and replies). Designate a topic for an email thread by selecting an existing topic or typing a new one into the window and hitting Enter. All responses to that email thread will be designated with the selected topic. Remove a topic assignment by selecting "<unassigned>" in the drop-down menu. Topics can also be assigned by dragging messages into ClearContext Topic Folders, discussed below.

Saving Sent Messages

Selecting the *Save Sent Messages* option under *Tools > Options > ClearContext > Preferences* ensures that sent messages with a topic assigned to them (either via the open message's topic drop down menu or because a topic was previously assigned to the thread) are automatically stored in the appropriate ClearContext Topic Folder rather than the Outlook Sent Items folder. This keeps received and sent correspondence regarding a given topic stored in one single location rather than scattered across multiple folders.

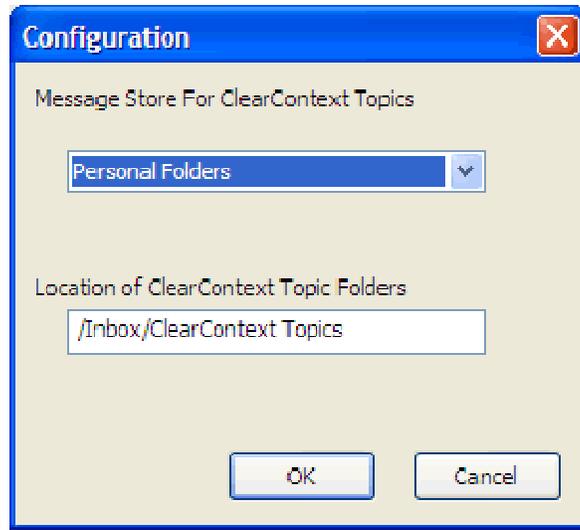


Filing Messages

Once a topic has been assigned, the *File Msg*, *File Thread* and *File Topic* buttons are available for use. When a new topic is created in the topic drop down menu, a topic folder with that name is created. (See below for configuration information regarding location of ClearContext Topic Folders). The *File Msg* button will move the current message from the Inbox into this folder. The *File Thread* button moves all messages in the Inbox from the current email conversation into the assigned topic folder. The *File Topic* button moves all messages in the Inbox with that assigned topic name into the topic folder.

Configuring Topic Folder Location

The default ClearContext Topic Folder location (where all topic folders are created and messages are filed when using *File Msg*, *File Thread* and *File Topic* buttons) is located under */Inbox/ClearContext Topics* in the primary email data store. This location can be changed via the configuration window located at *Tools > Options > ClearContext > Configuration*. The Message Store drop down menu allows you to change the .pst location that topics are stored in, while the Location function permits renaming of the folder where ClearContext topic folders are stored. For example, changing the location entry to */Inbox* will configure ClearContext to create new topic folders directly under the Inbox folder (and also make a ClearContext topic for each existing Inbox folder).



Topic Management Tips

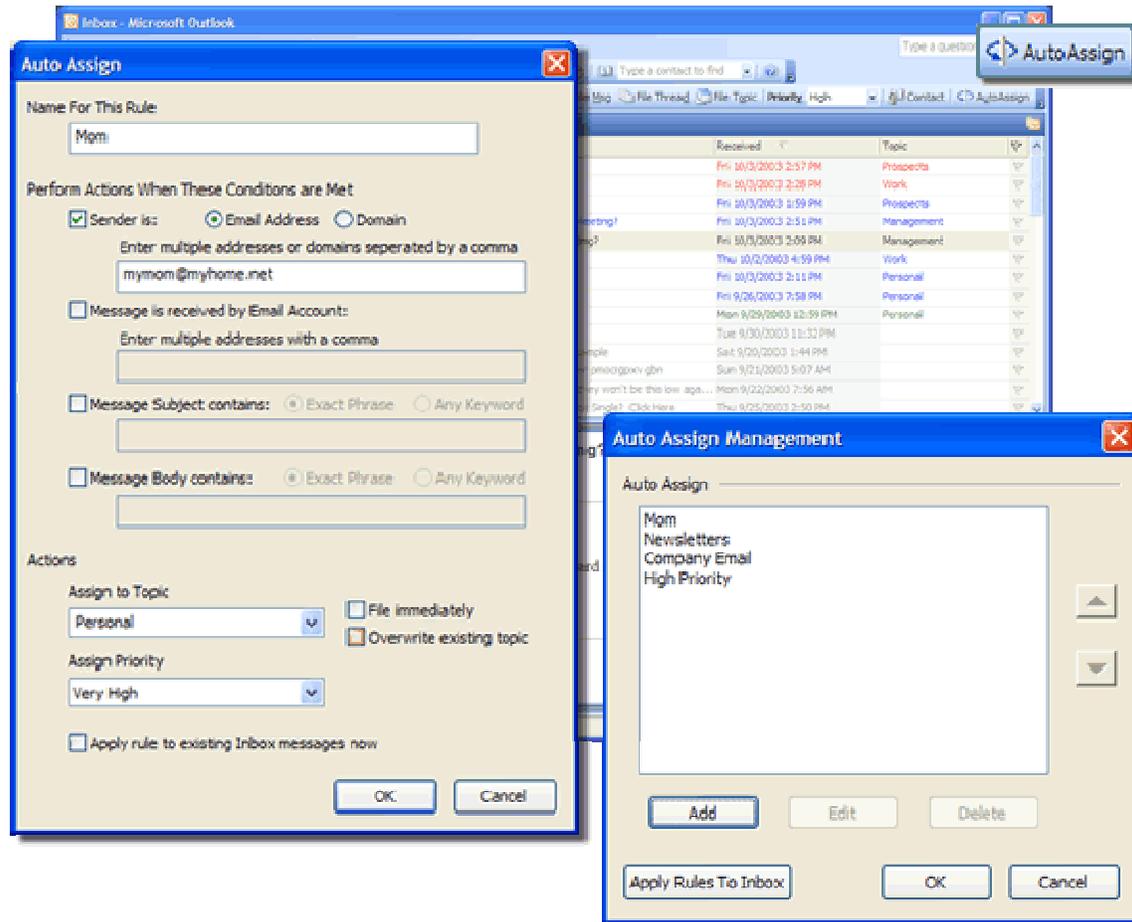
Multi-level Topics: To create multi-level topics, enter the topic names separated by a "/". For example, "Work/Project" would store the message in the "Project" subfolder underneath the "Work" main folder.

New Messages: Assign a topic to a new message via the drop down menu on the open message prior to sending. All email responses to that message will automatically include the topic name. In addition, if you are utilizing the Save Sent Messages option, this new message will automatically be filed in the appropriate topic folder.

Existing Storage Folders: Prior to installation of ClearContext, many users already store their email in folders. To take advantage of Topic functionality using these pre-defined folders, drag them underneath the ClearContext Topic Folder (as defined in the configuration settings detailed above). Each folder name will now be listed as a topic on the Topic drop down menu and the *File Msg*, *File Thread* and *File Topic* buttons will move messages into these locations. If all of these folders appear under the Inbox, simply change the ClearContext Topic Folder location from */Inbox/ClearContext Topics* to */Inbox* and full topic functionality will be available using the pre-existing folder infrastructure.

AutoAssign: Creating Rules to Automatically Organize Email

ClearContext AutoAssign functionality lets you create rules to automatically prioritize and/or file your incoming email based on parameters that you set. By using AutoAssign, you can easily organize messages such as newsletters, business email, and personal correspondence.



Types of AutoAssign Rules

You can create an AutoAssign rule by selecting the AutoAssign button on the Inbox toolbar or by accessing AutoAssign in the ClearContext options menu. AutoAssign rules can be created based on any combination of the factors below. In italics, we have highlighted examples of the types of email messages that might be filed using these rules.

- **Sender email or domain address** - These parameters are used to execute a rule based on the email address or domain that sent the email. Enter multiple addresses separated by a comma. *Designate emails from your boss with a topic such as **Work**. Designate messages from a certain domain as a topic such as **Newsletter** and automatically file them out of your inbox where you can read them later.*

- **Received by Email Address** - This parameter applies to users who have multiple email addresses (for example a personal and business email account) delivered to the same Outlook Inbox. Enter multiple addresses separated by a comma. *Flag emails sent to your personal email address with topic **Personal**. Assign a **Very High** priority to messages sent to a business or private email address so these emails are automatically highlighted in your Inbox.*
- **Keywords contained in the message body or subject** - ClearContext can search incoming messages for keywords that you designate. Designate an exact phrase or multiple keywords via the radio buttons above the rule. *Set the topic for regularly received emails with a certain subject (like "Order Information") to a topic such as **Receipts** and automatically file these messages. Search for keywords such as a stock symbol or major client name and set the priority of these messages to **Very High**.*

AutoAssign Actions

The following actions can be taken on messages that meet the criteria you designate in the AutoAssign rule:

- Assign to topic - designate a specific topic to be set for these messages. This topic can be used to both identify messages by topic in the Inbox and for automated filing.
- Assign Priority - assign a priority to these messages. This priority will be used as a factor when prioritizing the order of messages in your Inbox.
- File Immediately - messages processed by the rule can be automatically filed to the designated topic folder. This is very useful for messages such as Newsletters and Mailing Lists that can be automatically moved out of the Inbox into their own folders.
- Overwrite existing topic – this forces the rule to overwrite the topic on messages that are part of a thread with a previously assigned topic name.

Managing Multiple Rules

The AutoAssign Management Dialog allows the user to create and maintain AutoAssign Rules. The dialog can be accessed directly from the ClearContext Menu on the Inbox toolbar or via Preferences. Use the arrows on the right hand side of the window to move a rule up or down in priority. Once a single rule is executed against a message, the following rules are ignored. To execute all rules against the inbox, click the *Apply Rules to Inbox* button on this dialog.

AutoAssign Tips

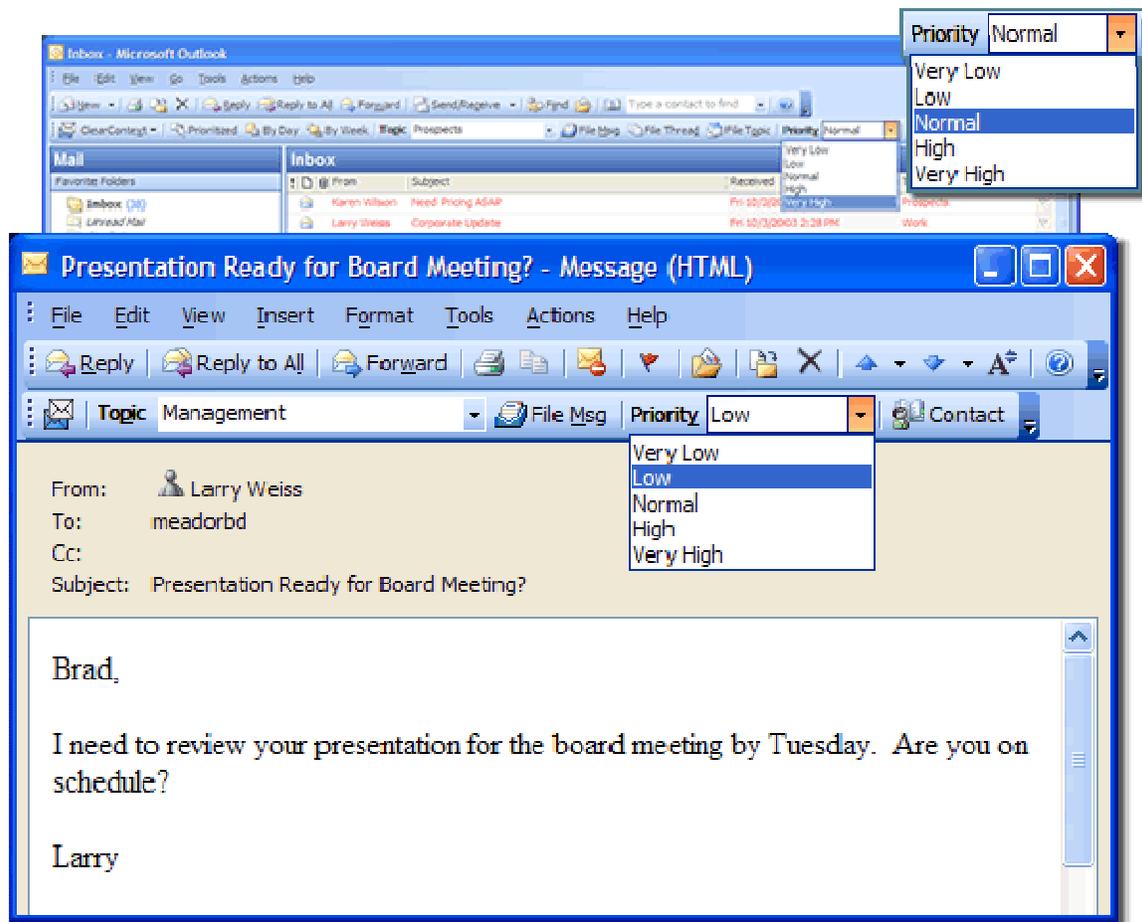
Automated Rule Creation: To create an AutoAssign rule for a type of message (for example a newsletter that you would like automatically filed), highlight the email message, click the AutoAssign toolbar button, and the email's parameters (address, subject, etc.) will be pre-filled in the AutoAssign rule creation dialog.

Automatic Filing: For messages that you want filed, but do not wish to see in your inbox, set up an AutoAssign rule with the message criteria you desire and click the *File immediately* checkbox. On receipt, new messages that meet your requirements will be automatically filed in the folder you have designed in the "Assign to Topic" drop down menu.

Inbox Cleaning: Do you have a bunch of messages that you want to prioritize, add topic names to, and/or file away? Use the *Apply rule to existing Inbox messages* now feature when creating AutoAssign rules to ensure that existing messages in the inbox that meet your criteria are processed appropriately.

Message Priority: Using the Inbox as a To Do List

When a new email is received, it is automatically assigned a default priority of Normal. Changing this priority via the manual priority button (located on the ClearContext toolbars) changes the importance of the message and all current and future email within that message thread (or conversation). This will change the message's relative position in the inbox.

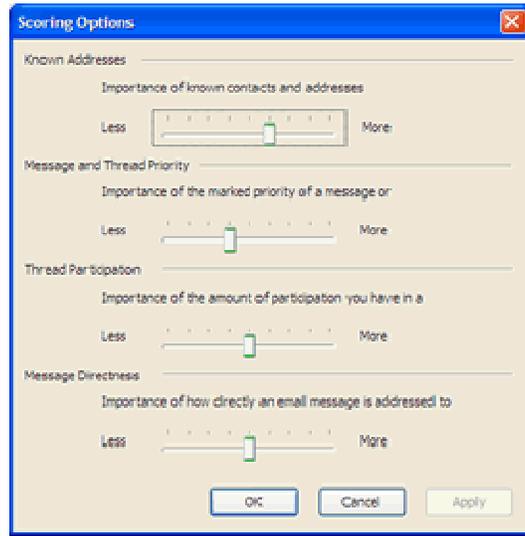


To Do Lists

For users who like to manage their inbox like a to do list, use message priority to increase or decrease the prominence of messages within the inbox. Your most important reminders will be situated at the top of the inbox while your lower priority messages will appear at the bottom.

Scoring Adjustment: Personalizing Email Prioritization

ClearContext uses a combination of several factors to analyze the importance of each individual email thread. The weighting of each of these factors is configurable via the Scoring Options dialog located at *Tools > Options > ClearContext > Scoring Options*. By adjusting these sliders, you can ensure that the messages that are most important to you appear at the top of your inbox.



Our patent pending scoring algorithm analyzes each message as it is received and assesses a score based on the factors below. In italics, we have highlighted examples of the impact adjusting each of these sliders will have on received email.

Known Addresses

ClearContext looks at the author of the email and assesses a score that is based on the sender's contact priority. *If the most important indicator of email importance to you is the sender of the email, increase this slider to use contact priority as the primary factor in prioritizing email. This will typically apply to users who receive email from a large number of different correspondents.*

Message & Thread Priority

This weights the priority manually assigned by the user to this email thread. The more you increase this slider, the more impact adjusting message priority will have on the email's position in the inbox. *Users who like to utilize their inbox as a To Do list can increase this factor and assign priorities via the ClearContext toolbar to adjust relative message position within the inbox.*

Thread Participation

This factor is based on the number of responses the user has made within this email thread and whether or not the user is the originator of the thread. *If you are a user who receives a high volume of informational email and your most important emails are typically the ones to which you reply, increase this weighting to ensure that email conversations that you are involved in receive higher priority.*

Message Directness

The score is based on whether the author's name is included in the To: or CC: field and whether the message is addressed to the user only or to several recipients. *If you are overwhelmed by CC:'d mail that does not require immediate attention, increase this score so that messages addressed directly to you with few other recipients receive high prominence in the inbox.*

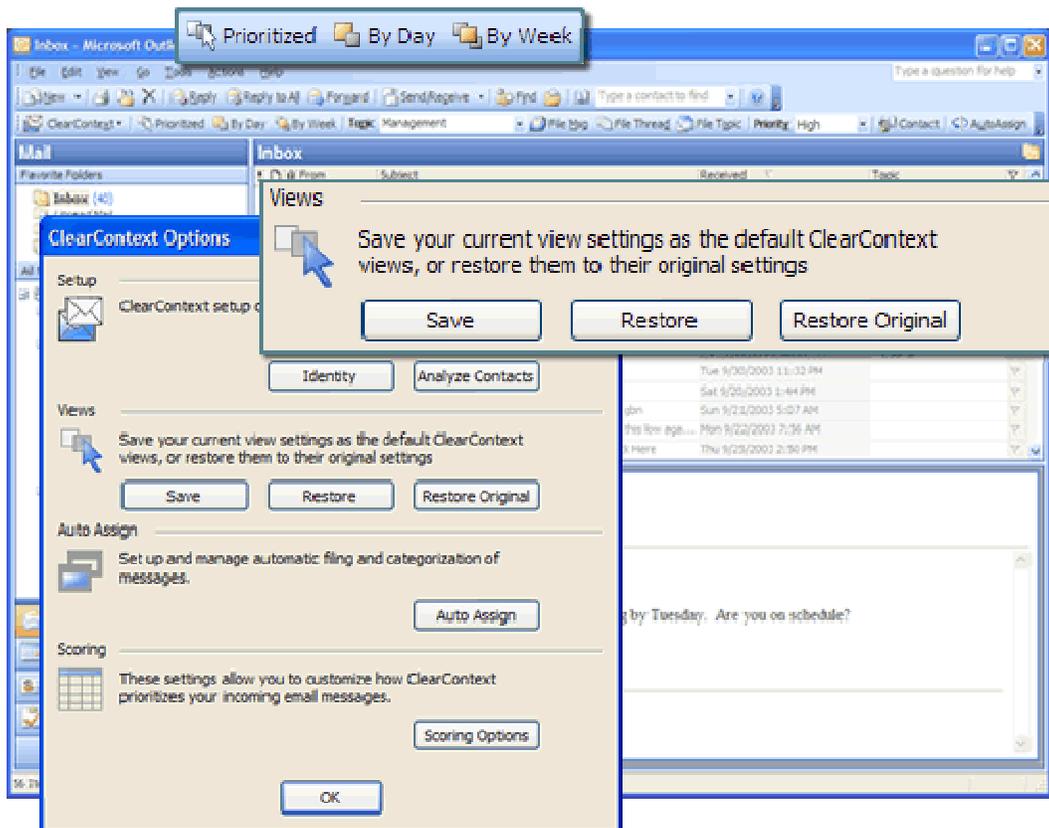
Scoring Tips

Scoring Personalization: ClearContext scoring defaults are based on factors typically found to be most important to our user base. Everyone has their own idea of what makes an email important. Adjust the sliders on the Scoring Dialog to customize prioritization to meet your individual needs.

Real Time Scoring Customization: You can access the Scoring sliders from the ClearContext Inbox toolbar by selecting *ClearContext > Options > Scoring* and see your inbox re-prioritized in real time based on the scoring factors you designate as most important.

Advanced View Management: Customizing Inbox Views

ClearContext comes with three customized views that display email messages that have been scored via the ClearContext patent pending scoring algorithm. All three views are accessed via the ClearContext Inbox toolbar, depicted below. Advanced customization may be completed to tailor the views to the user's individual needs.



Factory Installed Views

The *Prioritized* button on your inbox toolbar organizes all emails in your Inbox solely based on their importance. *By Day* and *By Week* do the same, but separate them into groupings by received day or week. In each of the Views, highest priority emails are shown in red, normal, personal correspondence is blue, low priority emails from known senders are green, and mail from unknown senders (including spam) is black and grey. The view currently in use is designated by the arrow icon ().

View Restoration

To restore a view that has been changed (either by clicking a column heading - From, Received, Subject etc. - or by changing in the view menu) click the highlighted ClearContext view button and select yes if/when prompted to restore views. To restore factory views, go to the views section under *Tools > Options > ClearContext*.

View Configuration

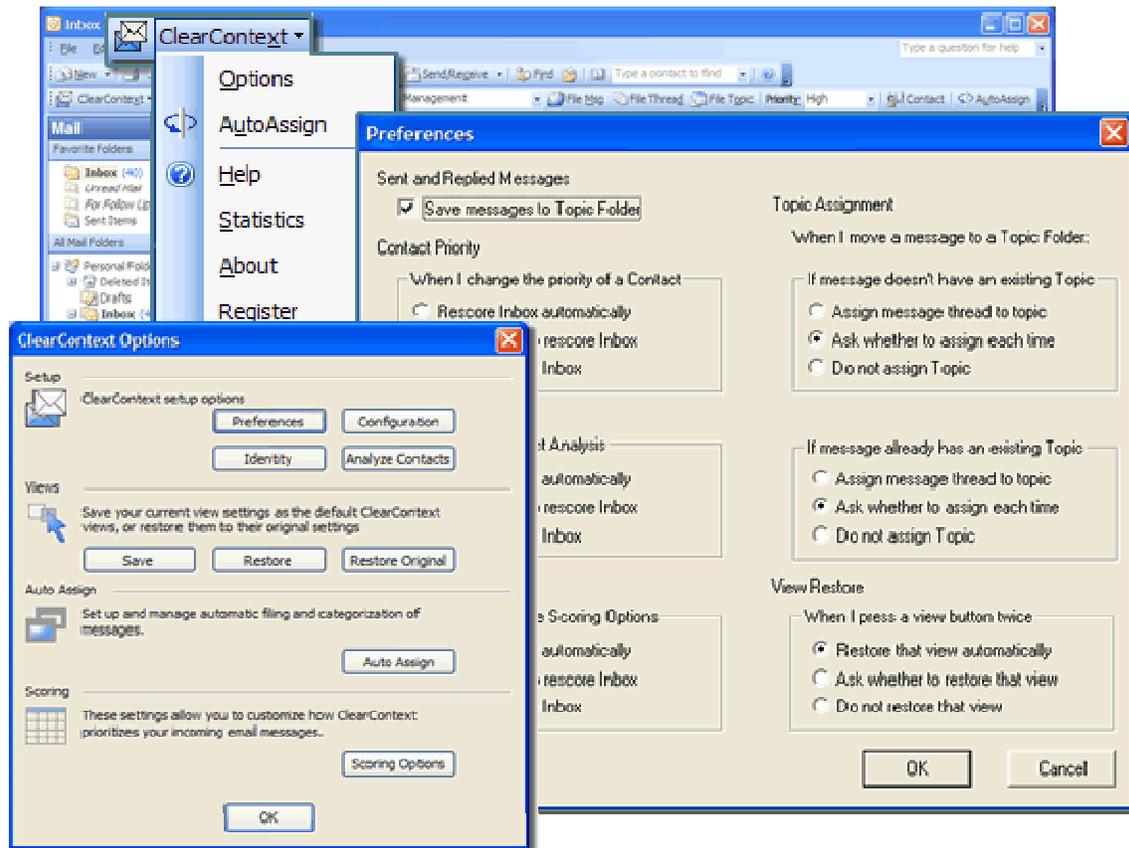
You can modify ClearContext views in any way you like and save a copy for future use. Changes may be made within the Outlook Views menu. Select the *Automatic Formatting* function underneath the View menu in Outlook (*View > Customize Current View > Automatic Formatting*) and alter the font of the ClearContext fields *CC-HighPriority*, *CC-MediumPriority*, *CC-LowPriority*, and *CC-NonJunk* to display messages in different colors, styles, etc. . After making the modifications you desire, select *Tools > Options > ClearContext* and hit the "Save" button under the Views subsection. This saved view can be restored from this dialog by hitting the "Restore" button. Alternatively, clicking a highlighted view button on the ClearContext toolbar will also restore views. If you want to revert to the factory default views, select the "Restore Original" button on the options menu. You can toggle the Preview Pane (displaying the message in split-screen) and AutoPreview (viewing the first few lines of unread messages) from the View menu on the main Outlook menu. You can revert to the default Outlook Inbox view by selecting *View > Current View > Messages*. See the FAQ on www.clearcontext.com for additional instructions on how to change views.

Downloadable Views

There are a variety of additional views available for download on our views page, located on www.clearcontext.com. Look here to find different color schemes, views with and without AutoPreview, views that use Outlook *Group By* functionality for dates, and a view for those who are colorblind.

ClearContext Menus, Options, & Preferences

ClearContext provides several screens for access to features to configuration of the product.



ClearContext Menu Bar

The ClearContext Menu bar (located on the left hand side of the toolbar) provides quick access to the ClearContext Options and AutoAssign dialogs (see below for more detail). In addition, the Help menu item links to support pages on the ClearContext Website and the About menu gives general information regarding the product. Finally, click on the logo to go to the ClearContext.com home page.

ClearContext Options

The ClearContext options control panel, located at *Tools > Options > ClearContext*, gives the user access to all of ClearContext's basic functions. This is the place to go when looking for ways to optimize configuration of the product, restore views, re-analyze contacts, manager AutoAssign rules, or alter scoring preferences.

ClearContext Preferences

To change sent message storage, rescoring options, view restoration, and topic assignment handling, select the *Preferences* button at *Tools > Options > ClearContext*.

Additional Resources

If you didn't find what you were looking for in this User's guide, much additional product information is available on www.clearcontext.com, including a FAQ, Features Overview & Competitor Comparison, and Example Case Studies. Whitepapers, a productivity calculator, and email tips can be found on our Additional Information page. Finally, if you can't find what you are looking for in these pages, head to our Features and Support Forum.