



SLIM Companion™ Email Manager

User Guide

This document provides an overview of the functionality provided by SLIM Companion Email Manager 2.2

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1. Introduction

SLIM Companion™ Email Manager increases user productivity and provides unique functionality to simplify your work. View emails in the browser, view email attachments, attach SharePoint documents to emails and more...

This document describes the key features for using the App. More detailed information about the functionality offered and the technical specifications is available on <http://www.slimapplications.com/>.

The assumption is made that the App has already been installed by a SharePoint Administrator or user with sufficient permissions.

2. Getting started

2.1 Open SLIM Companion Email Manager

The SLIM Companion Email Manager App is accessible through the ribbon and through the ellipsis menu. In the modern view the SLIM Companion Email Manager section is directly visible.

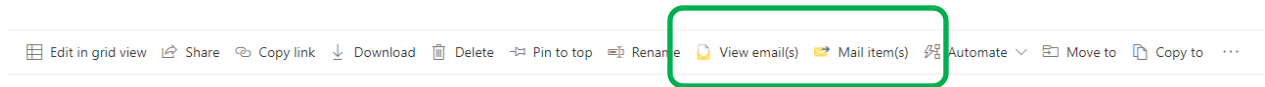


Figure 1. SLIM Companion Email Manager in a document library using the Modern view. The SLIM Companion Email Manager section in the ribbon is marked in green.

The “View email(s)” button is always visible whereas the “Mail item(s)” is only visible when one or more items have been selected.

The SLIM Companion Email Manager functionalities are also available under the ellipsis menu. For example, for a document the options “Mail item(s)” is added.

Documents

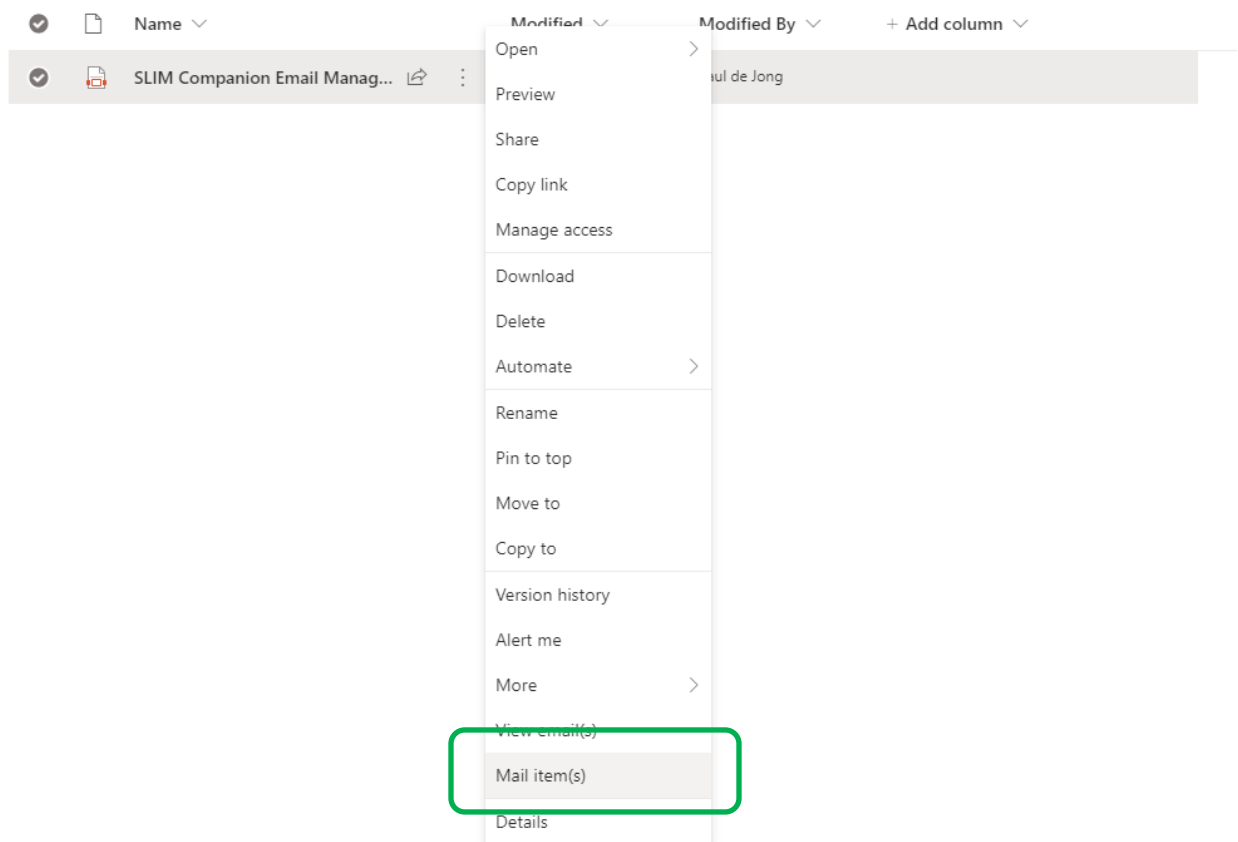


Figure 2. SLIM Companion Email Manager additional options (marked in green) in the ellipsis menu of a document.

3. SLIM Companion Email Manager features

3.1 View emails

Select one or more emails in the document library and click the “View email(s)” button. This opens a dialog window with the preview of the 1st email.

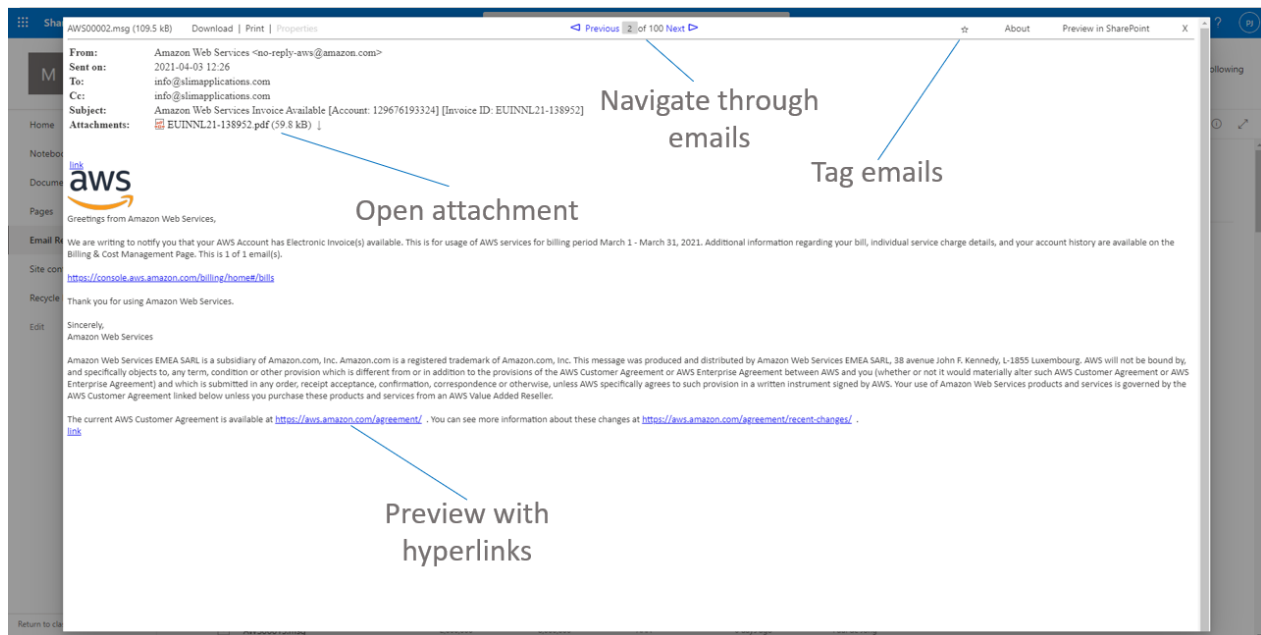



Figure 3. Email Manager with a view of an email.

The view shows the email’s metadata such as To, From, .. and also lists the details of the attachments.

The “previous” and “next” buttons at the top of the window provide easy access to the adjacent emails. This right arrow and left arrow buttons on the keyboard also allowing moving to the next or previous emails. Enter the number of an email to jump to that email.

The  icon at the top of the page allows tagging of emails of interest. Upon closing the dialog window these emails are selected for further processing. For example, move to a different location, change properties for these emails, download, ...

The “Preview in SharePoint” allows previewing of the current email using standard SharePoint preview. This may be useful in cases when the email formatting is complex (e.g. tables, lots of images, ...) and the Email Manager preview is not sufficient.

Hyperlinks in the emails are shown and open in a different tab.

The preview window can be closed by clicking the X at the top right corner or using the ESC key on your keyboard.

3.2 View email attachments

Unlike standard SharePoint preview the attachments can be opened directly. Clicking on the attachment will show the attachment in the browser.

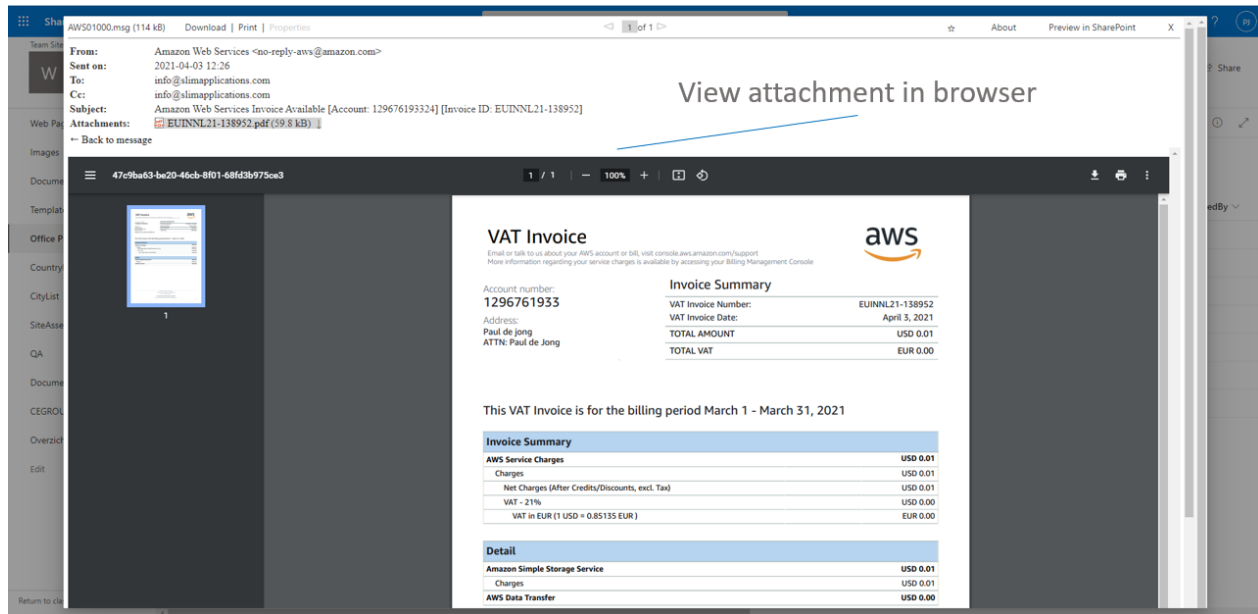



Figure 4. Email Manager with a view of a pdf attachment.

The attachment(s) can also be downloaded individually using the  icon adjacent to the attachment name. The following file formats can be directly shown in the preview window: pdf, png, jpg, bmp, gif, msg, eml, xml and svg.

In case the file cannot be directly viewed (docx, xlsx, pptx, tiff, zip, dwg, ...) the option to download the file is shown.

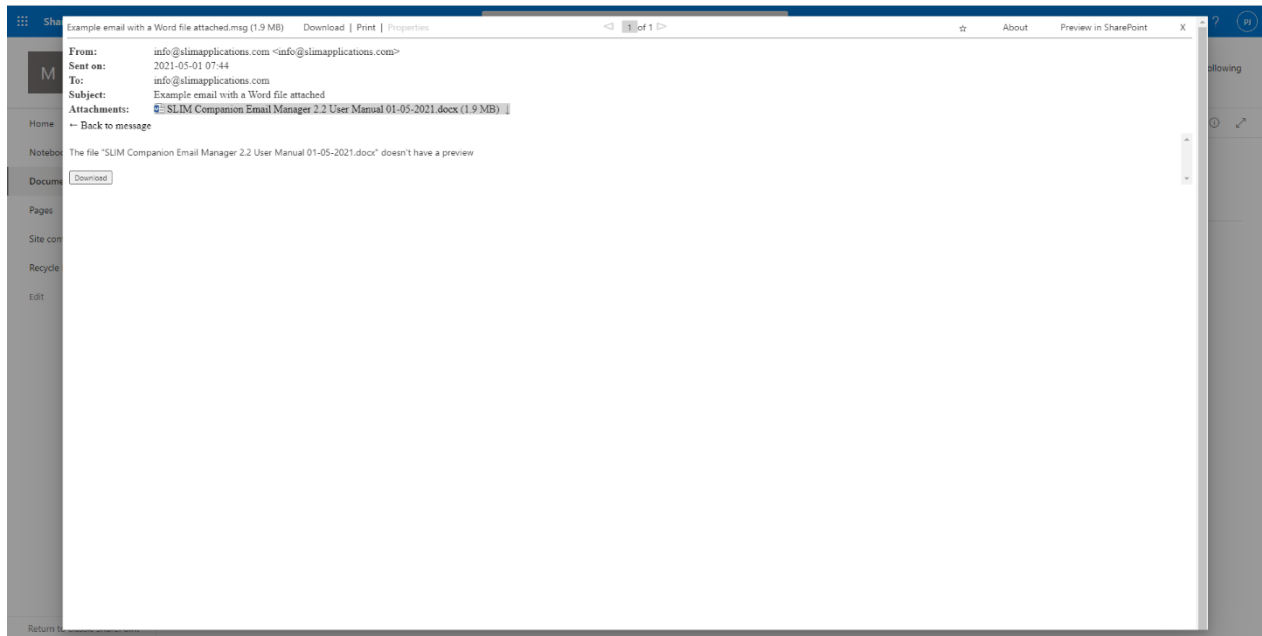
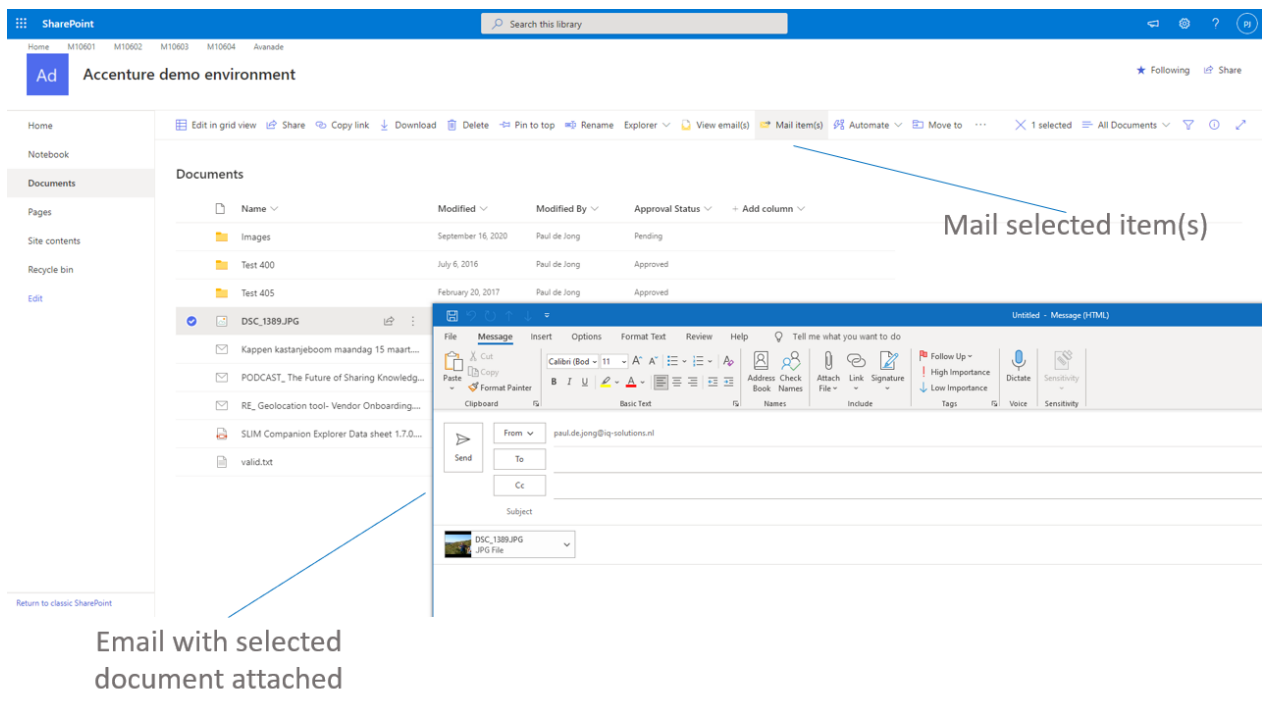


Figure 5. Email Manager with a view of a Word attachment.

3.3 Mail item(s)

SharePoint document(s) or folders can be directly attached to a new email.

Select one or more documents and click the “Mail item(s)” button. This generates a new email with the selected items attached.



An email with a zip file as attachment is generated In case multiple documents are selected.

3.4 Filtering and sorting columns

The tool can handle filters on column values and sorting orders on columns. The tool will show the same items in the same sort order in the preview window.

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