

makeuseof

beyond the inbox:

a power user
guide to gmail

by shay shaked



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Edited by Justin Pot



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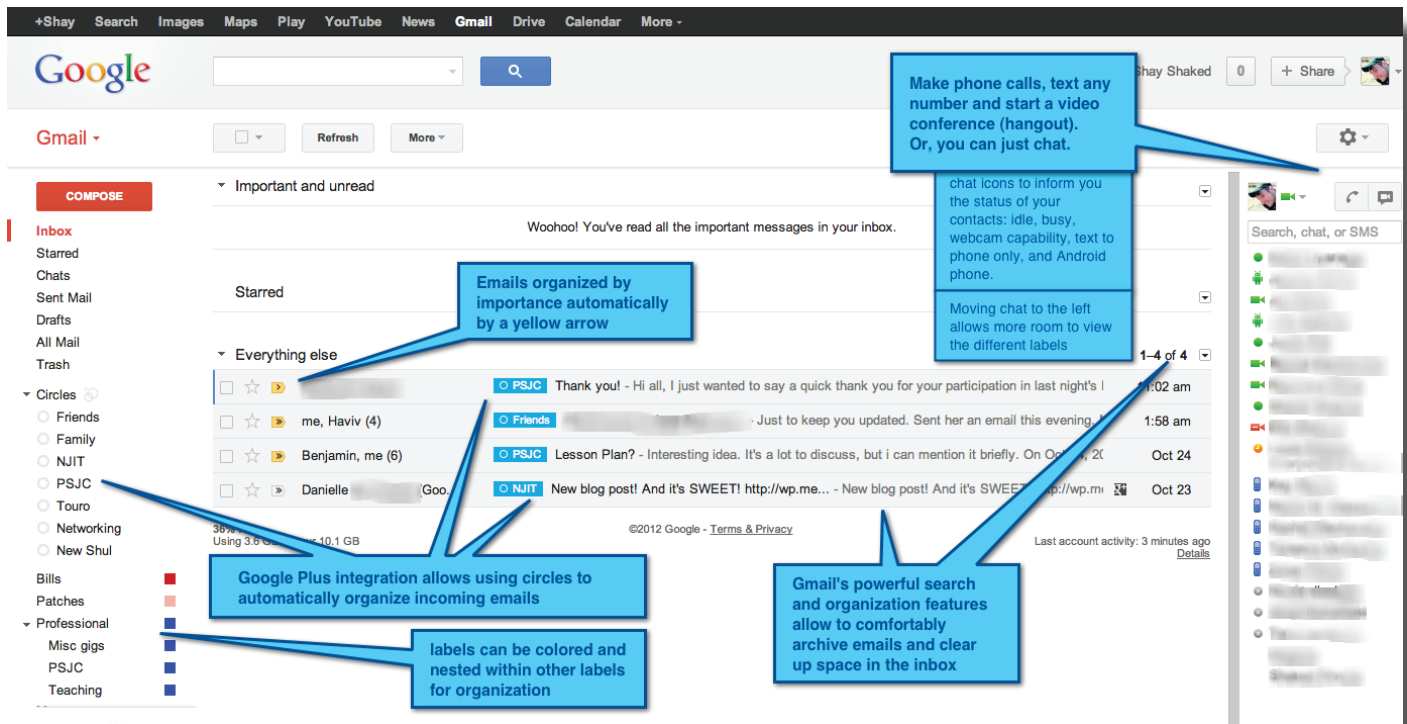
1. The New Gmail

Gmail has changed so much in the past two years that referring to it simply as an “email client” doesn’t do it justice. Think of it this way: you could use your smartphone exclusively to make phone calls, or use a MacBook Pro only to create text documents. You could own a sports car you only ever drive a couple of blocks. You could, but there’s just so much more these things could do for you, and you’d be wasting your money to only use them for one thing. The same can be said about Gmail, even though it doesn’t cost you a dime to use.

This manual is not for new Gmail users, but for those of you who already use Gmail as an email client and want to take advantage of its many features. Those of you who *are* new should probably read [The Ultimate Guide to Gmail](#) first, which will give you an introduction to the service and how to use its most important features.

1.1 Themes and the effective Gmail mindset

A picture is worth a thousand words, so instead of explaining how my Gmail interface looks I’ll just show you:



What is the first thing you noticed? The chat to the right (see chapter 2)? The circles integrated into the labels at the left (see chapter 3)? The strange looking yellow arrows in my inbox next to the emails (see chapter 5)?

Actually, the first thing I’d like to talk about is your Gmail theme. I bet it’s the one thing you *didn’t* notice right away. No fancy stars, no ninjas hanging between subject lines, no picture in the background... And that’s the point: the theme is simply out of the way. With themes, or Gmail “skins” you can choose for your Gmail to change its appearance, which is a favorite feature among many users. You can read the [original guide to Gmail](#) to learn how to apply them, but I’d argue that if you’re serious about being effective with your emails, you should get rid of your theme and keep things as simple as possible.

Your Gmail theme is more than just a collection of colors. It sets up your mood when you’re viewing

your emails and can even affect how you respond to them. In a professional Gmail account – where you deal with work, projects and networking – efficiency should take precedence over creativity. Choose a clean theme with high contrast and keep things simple. Don't overwhelm yourself with a mess of colors.

I have nothing against creativity and color – in fact, I write fiction and short stories myself when I'm not writing technical manuals. I love art and I take photos, which I often email to friends and family. This is why I have an additional, *personal* account - and so should you. Separating your work and your personal life is probably one of the most important things you can do for the success of both.

So my first assignment to you toward a more effective Gmail is to change your Gmail back to its original theme, or the high contrast one. Try it for a couple of weeks and you will learn to appreciate it. Don't underestimate this little but important task: it will put you in the right mindset for the rest of this manual.

1.2 Empty your mind, empty your inbox

Another thing about my inbox you might notice: I only have four emails in it. I've been a Gmail user since 2007 and I currently I receive about 15 to 20 emails a day. As I'm writing this manual, my total Gmail email count stands at 31,519, but you only see four in my inbox. Why?

Keeping your inbox in Gmail empty is another key point in effective Gmailing. Like the simple theme, it is a mindset you need to train yourself to get into. A large blotted inbox full of messages is the equivalent work desk full of papers. You should only use your inbox for emails you haven't read yet and need a reply; the rest belong in storage. We will later learn how to use Gmail's powerful filters (see chapter 4) to organize incoming emails and how to use keyboard shortcuts (see chapter 5) to quickly archive emails that do not require your immediate attention. Gmail also offers a priority inbox and a smart automatic labeling system that ranks incoming emails by importance (also in chapter 5).

Treat your inbox like a "to do" list. Any email in it requires you do something about it (usually reply to it). As soon as you're done taking care of that email, archive it. You may be surprised to learn how relieving an empty inbox can be.

1.3 Gmail and integration with other Google products

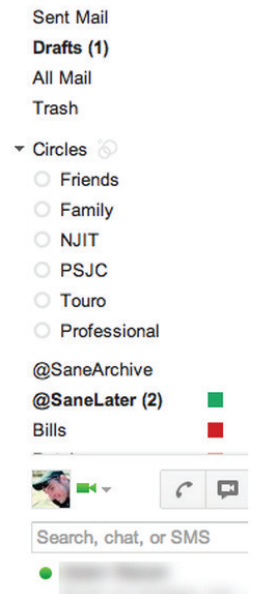
While this manual focuses on Gmail and how to get the most out of it, Google has released many products since Gmail's launch in 2006 that work together in harmony through Google Plus. There is a lot that can be said about Google Plus and other services (some of which we will cover in different points in this manual), but for now, try to envision Gmail as one "layer" of service on top of other layers, all flowing together in one direction.

Many of the enhancements to Gmail described in this manual work through these other services that are fully integrated into Gmail. In order to take full advantage of these, you will have to venture forth and look into them. I strongly encourage you to do so.

2. Gmail as a communication hub

2.1: Give chat the room it deserves

Hopefully you're now into an effective Gmail mindset, so I want you to consider Gmail's most advanced feature: chat. By default, Gmail squeezes the "chat bar" to the lower left corner of the screen, hidden under a separating line. This is probably how your chat is set up right now:



If you want to use Gmail as a communication hub, you have to give the chat bar a much more prominent position on the screen and free it from its confined space under the labels. To do this, we will move the chat bar to the right of the screen. Go to settings (under the gear icon on the top right side) and choose the "labs" tab. In the search window that appears, type "chat" to see only the available option for chat features. Check (enable) the right-side chat option, and don't forget to click "save changes" when done at the bottom of the page. Gmail may reload: don't worry, that's normal.

COMPOSE

Inbox
Starred
Chats
Sent Mail
Drafts
All Mail
Trash

Circles

- Friends
- Family
- NJIT (1)
- PSJC
- Touro
- Networking (1)
- New Shul

Bills
Patches

Professional

- Misc gigs
- PSJC
- Teaching

More ▾

General Labels Inbox Accounts and Import Filters Forwarding and POP/IMAP Chat Web Clips Labs Gadgets Offline Themes

If (when) a Labs feature breaks, and you're having trouble loading your inbox, there's an escape hatch. Use <https://mail.google.com/mail/u/0/?labs=0>.

Search for a lab: e.g. search, gadget, preview

Enabled Labs

Marvin and Shirley Nicole R Chris I Slatka Cui	Green Robot! by Chad Y Chat buddies show up as robot icons if they are currently using Android. Helpful to determine if you are chatting with someone on a computer or someone on an Android device.	<input checked="" type="radio"/> Enable <input type="radio"/> Disable Send feedback
me: sup yo... do you think we should	Pictures in chat by Dave C See your friends' profile pictures when you chat with them.	<input checked="" type="radio"/> Enable <input type="radio"/> Disable Send feedback
Dave: Yeah, and maybe suggest another one	Right-side chat by Emily C Move the chat box to the right side of the inbox.	<input checked="" type="radio"/> Enable <input type="radio"/> Disable Send feedback
gmark 506 132 2314 ▾	SMS (text messaging) in Chat by The SMS Team	<input checked="" type="radio"/> Enable <input type="radio"/> Disable

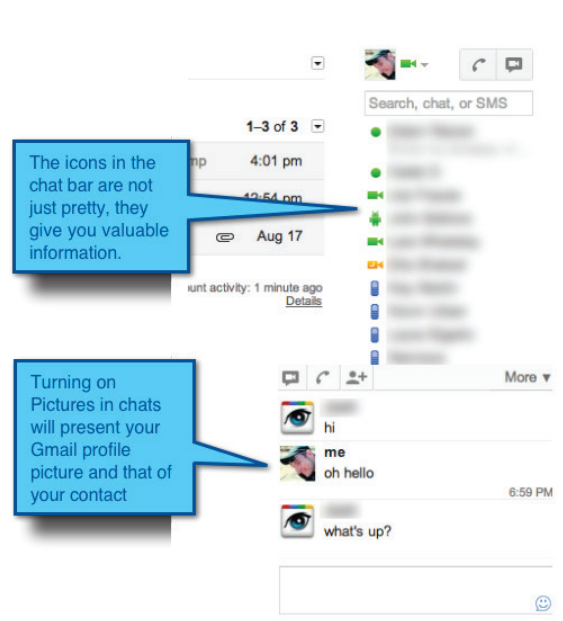
That was easy, wasn't it? Remember this Labs tab; we will return to it soon and use it often for additional features.

Right side chat uses the right side of the screen, which is relatively unused in Gmail. It allows you to see more of your contacts at once, makes chat more visually prominent and gives you more room to view your labels at the left, without constantly moving that annoying dynamic bar. This is a simple win-win situation; there's hardly any reason to keep the chat to the left.

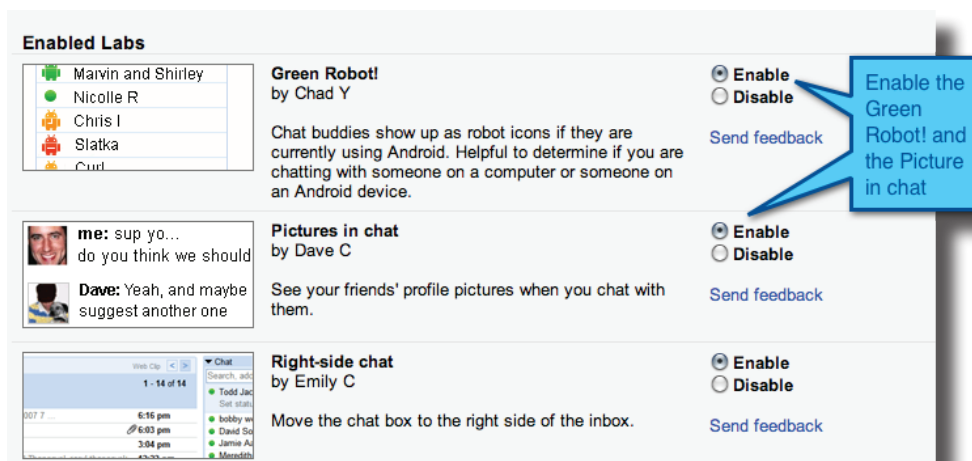
2.2: Make chat more informative

Next, a couple of fun tweaks. By default, Gmail chat will only show you if a contact is available, busy or idle by color (green for available, orange for idle, and red for busy). A little camera icon shows next to a contact with video-conference capabilities (or Hangouts, in Google terms). You will see a cell phone icon like the one in the image below if you have a phone number for that contact and if you have enabled Gmail's SMS capabilities -- more on this later.

There are two features you should turn on: the "Green Robot" and "Pictures in chat." Aside then being amusing, these icons would tell you when your contacts are on logged into Gmail chat from their Android phone and will also allow you to see your contacts Gmail profile picture in chat, which makes chatting more visual organized.

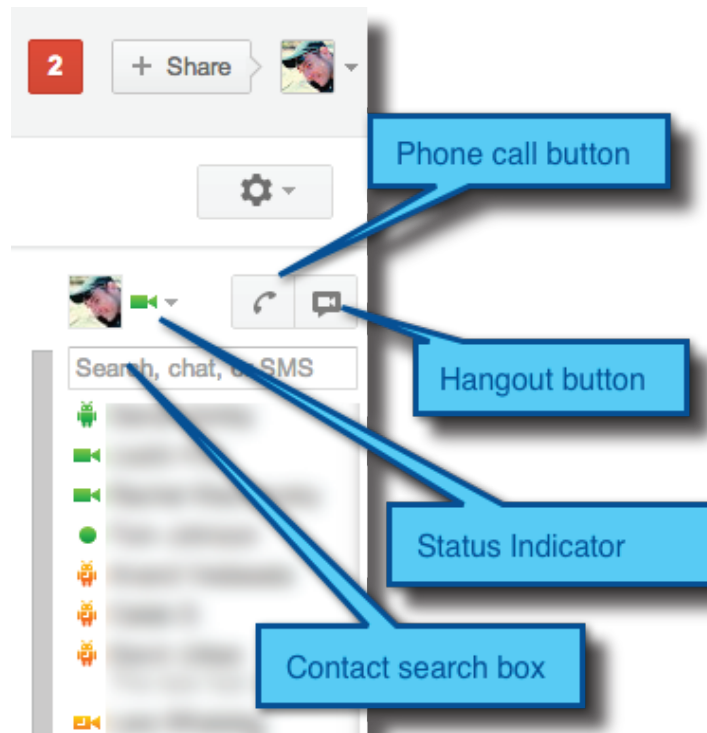


In order to turn these two features on, go back to your Labs tab under Settings:



2.3 Using chat for more than just chatting

As I mentioned earlier, Gmail's chat is one of its most powerful features. Unfortunately, many Gmail users are still not aware of its full capabilities, and Google seems to do a poor job of making these features known.



Let's take a closer look at our chat bar. At the top left we see our profile picture and our status indicator. Clicking on the image or the icon right next to it will bring up a window that enables us to change our status and control how many contacts we see in our chat list. From my experience, a medium-sized list is best: it will show you most of the contacts you keep in touch with, but without going out of the visual area of the screen.

Click the status indicator and make sure "Most popular" is checked under "Show in chat list." As you hover with the mouse cursor over it, a sub-menu will appear; choose medium to get the medium-sized list.

The other features under the status indicator are self-explanatory: they allow you to insert a status message, such as "busy at work" or "on my phone," and indicate whether you're busy or available. You can also turn invisible mode on – this makes you appear as signed off to your contacts. Finally, if you have a webcam available and are set up for Hangouts, the green or red dot next to your picture will turn into a camera icon, telling your contacts you can have a Hangout with them.

To the right of the status indicator there's a phone receiver icon, or the phone call button. This addition to Gmail has been around for a while, but only recently it became operationally independent from Google Voice. Clicking this button will bring up a phone interface complete with dial pad. You can either click the buttons with the mouse, punch the numbers in directly using the keyboard, or simply paste a number into the text box.

Calling from Gmail is not just quick and effective: it is also completely free (in the USA and Canada). Just make sure you have a microphone and you're set. Or, even better, you can purchase a headset (cheap gaming headsets sell for around \$20). And why wouldn't you? Enjoy.

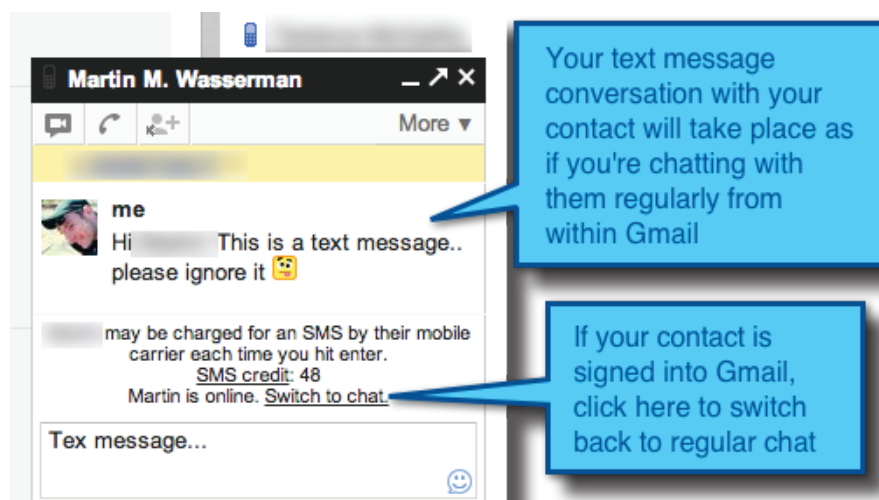
Next to the phone call button is the Hangout button, Google's version of video conferencing. Hangouts are a Google Plus component which allows you to talk with up to five people in Gmail (it is possible to talk to more people directly through Google Plus). You can even have people join in via phone. It is Gmail's ultimate communication tool and one of the best features it can offer you. If you've used Gmail for chat before, clicking the Hangout button will bring up a list of your Hangout-capable contacts (those with the cinema-camera icon next to their names) to choose from.

Under the icons mentioned above, right before the name of your contacts, you will see the contact search box. Use it to enter names of a contact not currently on the list – names will appear as you type. When you choose a name, a window with options will show, which will enable you to email, chat (or send an offline chat if the person is currently offline), call and send an SMS (text message) if you have turned this option on (coming up next).

2.3.1 Turning on SMS (texting) capabilities

Another hidden gem in Gmail is the ability to send SMS (text) messages to any cell phone in the US or Canada, free of charge. Remember all these text messaging packages provided by your carrier? Forget about it! This little trick allows you to text your contacts as if you're engaged in a regular chat with them, right inside a Gmail chat window. You will see their name as they text back, and they will see your email address on their phone as the sender. To activate SMS, return to your Labs section under Settings and search for Chat again. Turn on the "SMS (text messaging) in Chat". That's it.

You will notice two things. Firstly, contacts with a phone number in your list will have a little cell-phone icon indicator next to their name. This means you can click the contact and choose the "send an SMS" option from the pop up window you saw before. The second thing is the option to send an SMS under the "more" menu inside the chat window when you chat with a contact. This will switch the chat from regular Gmail chat to SMS chat, and will include a message in the bottom, indicating how many more text messages you can send that person before Gmail will block you from texting further (as a precaution against flooding people with spam). Gmail will automatically block you after four or five consecutive text messages without a response, and a response from your contact will reset the SMS credit back to 50.



Notice that you can also call contacts or start a Hangout with them directly from the chat window, as indicated by the buttons at the top of the chat window. The third button (to the right of the Hangout button) allows you to add another person to the chat, so you can chat with two or more people at once.

2.3.2 Google Voice and getting your own number

We can't talk about phone calls and text messaging in Gmail without mentioning Google Voice, even briefly. Google Voice is another excellent service from Google, and it works as an operator of sorts

between your carrier and your contact.

Google Voice's features go beyond the purposes of this manual, but I will mention here that if you have Google Voice set up you get to keep your phone number when you make phone calls from within Gmail. Further: you can listen to your voicemail messages directly from Gmail and organize them as if they were just any other email. Finally, Google offers very competitive prices for international calls, but you can only set these up through Google Voice. This is truly an excellent service, especially if you have friends and relatives abroad. I encourage you to check out Google Voice as soon as you can.

3: Labels: Gmail's DNA

3.1 What are labels, exactly?

Labels are at the heart of the way Gmail is organized. When Google first rolled out its email service, most users compared Gmail to Outlook, and Gmail's labels to Outlook's folders. They look about the same (inbox, sent emails, drafts...) and seem to be doing the same thing, so most users left it at that and treated the word "labels" as nothing more than a marketing pitch. But labels *are* different, and it is important that advanced Gmail users (such as yourself) know the difference before we move on.

Labels work more like tags than folders. If emails are paper documents placed into folders, labels are like colorful stickers placed on these papers to categorize them further. Emails are not placed directly *in* a label, they are *associated with* a label; therefore, one email can have more than one label (think back to papers with several stickers), and emails can be searched for more than one label as well.

For example, my "professional" label in Gmail contains emails from both of my workplaces. I have a label for each location, but some material is common to both places. These emails then have *three* labels: the "professional" label, indicating it's work related, and labels for each workplace. This allows me to search for material that answers the needs of *both* locations.

I could go into further examples and use something like a Venn diagram, but you're probably as excited to move forward as I am. Instead of extending the discussion on labels vs. folders here, let me direct you to [an excellent article I found at washington.edu](#). It is much more thorough than I can be here.

Everything in Gmail is label based. There are no folders and no links that open to different parts of the website; all messages exist right there; Gmail merely shows the right label association when you choose it.

3.1.1: Labels settings and kinds of labels

All labels settings in Gmail can be accessed from the Labels tab inside Settings. We will refer to this tab often, so I suggest you get yourselves familiarized with it now. There are now *three* kinds of labels inside Gmail: System Labels, Circles and Custom Labels. You will only see Circles in Gmail if you upgrade to Google Plus (coming up). You will also notice that you have more options the further down you go, with custom labels offering you the most flexibility.

System Labels and Custom Labels have a "Show in IMAP" option; these options should be configured if you're using a different app or software (such as Outlook or Mail), and for certain plugins. This manual is geared toward getting the most out of the Gmail interface, therefore I will not get into these options here. If you're interested, make sure you read the original Ultimate Guide to Gmail.

3.2 System Labels

The most familiar labels in Gmail are the System Labels. These are the links in the top left you've seen since you started using the service: Inbox, Starred, Sent Mail, Drafts, Trash. For effective Gmailing, I suggest you have these system labels available to you: Inbox, Starred, Chats, Sent Mail, Drafts, All Mail, and Trash. You will also notice that you also have "show if unread" option for the Drafts and Spam labels. Turning this option on would show you these labels only if they are associated with any emails. Personally, I like to keep my Draft label on at all times. Experiment and see what works for you.

3.2.2 All Mail and archiving old emails

You may recall the empty Inbox philosophy from the introduction of this manual. If your inbox is a work

Settings

General **Labels** **Inbox** **Accounts and Import** **Filters** **Forwarding and POP/IMAP** **Chat** **Web Clips** **Labs** **Gadgets** **Offline** **Themes**

System labels

Label	Show in label list	Show in message list	Show in IMAP
Inbox			<input checked="" type="checkbox"/>
Starred	show hide		<input checked="" type="checkbox"/>
Important	show hide		<input checked="" type="checkbox"/>
Chats	show hide		<input type="checkbox"/>
Sent Mail	show hide		<input checked="" type="checkbox"/>
Drafts	show hide show if unread		<input checked="" type="checkbox"/>
All Mail	show hide		<input checked="" type="checkbox"/>
Spam	show hide show if unread		<input type="checkbox"/>
Trash	show hide		<input type="checkbox"/>

Circles

Circle	Show in label list	Show in message list
Circles	show hide	
Technology	show hide	show hide
Education	show hide	show hide
Friends	show hide	show hide
Family	show hide	show hide

Labels

Label	Show in label list ▼	Show in message list ▼	Actions	Show in IMAP
Bills 509 conversations	show hide show if unread	show hide	remove edit	<input checked="" type="checkbox"/>
Boomerang 3 conversations	show hide show if unread	show hide	remove edit	<input checked="" type="checkbox"/>

Callouts:

- System Labels cannot be deleted** (points to the System labels section)
- Select which labels to see from Gmail's main screen to the left, or to see labels only if they contain any messages** (points to the 'show'/'hide'/'show if unread' options for system labels)
- Choose if to see the circle's name or your custom label name in your email list** (points to the 'show'/'hide' options for circles)
- Custom labels are the only ones you can delete from within Gmail** (points to the custom labels section)

desk, All Mail is your filing cabinet. Even better: a basement filled with filing cabinets. There's no need to go down to the basement every time you need to write an email, but it is useful to have it available should you want to retrieve a message from the past. All Mail is that basement. Turning it on (choosing "show") means having instant access to your past emails, organized by date. While you can access any old emails from the search bar, this link becomes quite handy when you clean your inbox often and just want a quick glimpse to find an email you received a bit earlier in the day.

3.2.3 Drafts usages you didn't consider

As you might know, Gmail automatically saves messages you write to the Draft label, even if you've only typed a couple of sentences. Anything you've ever written and not sent is stored there. Chances are you probably have a couple of drafts stored already (or maybe more!)

What you may not have considered, though, is that the Mail app on your phone is probably one of its most reliable and stable apps. Emails have worked with cell phones before smartphones existed. They are programmed to sync with your email client seamlessly (assuming you have it set up appropriately, of course) and in case you don't have reception later they will sync with your email as soon as possible.

So here's an idea: you could use drafts for quick notes, to write down ideas, make shopping lists, or store someone's contact information quickly. Most mail clients today give you the option to attach files and pictures to an email, even if you don't have a smartphone. This makes your draft folder an excellent place to upload files and sync between computers if you need a quick solution, or if you left your

USB drive at home. Don't leave files in your drafts folder though! This is not the place for them.

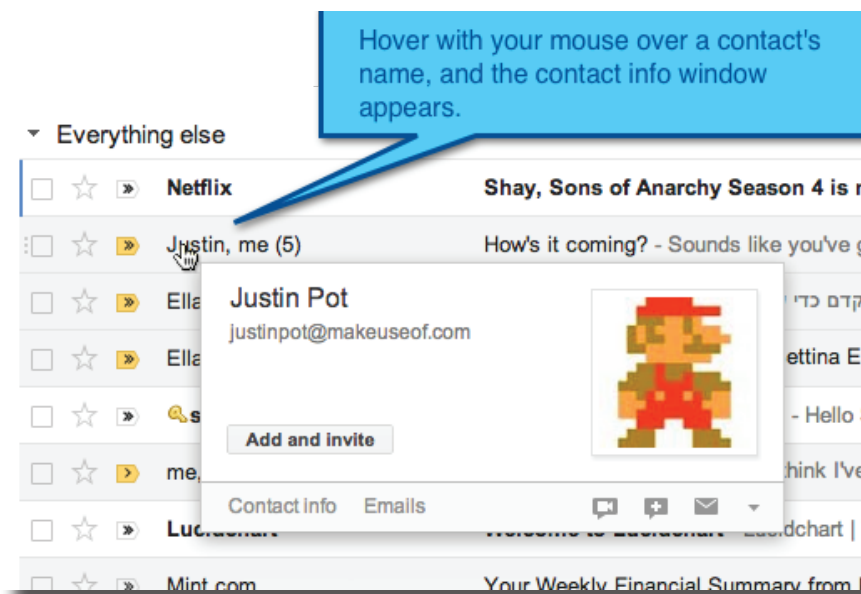
Another great use for the draft folder is to store templates. If you find yourself composing the same email over and over, save a blank copy of the email in your draft folder and copy-paste it into a new email every time you need it (don't send your original draft - this will remove the draft label!). You can save your email signature, links, and even images this way. Give your template-draft email a topic that reflects its usage to you for easy reference, such as "wedding: thank you letter" or "fans: thank you for adding letter" etc.

3.3 Circles

Circles Labels (or just circles) are a bit tricky: they are created and maintained outside of Gmail, through Google Plus. Most people today consider Google Plus as yet another social network, but if you remember my introduction, Google Plus is sort of the "river" into which all other Google services flow. Let me just stress again that in order to get the most out of Gmail today you should at least register with Google Plus.

Upgrade to Google Plus by clicking the "+you" button to the left of the black bar on top of your Gmail screen, and follow the instructions. Alternatively, you can also read "[Get into Google+ a Guide for Everyone](#)" and learn more about what Google Plus has to offer. Once you have enabled Google Plus, you should be able to create circles and modify their appearance on Gmail.

In order to add a contact to a Google Plus circle all you have to do is to hover over their name in the email list:



From there click the "add and invite" button – a list of your Google Plus circles will appear. Click on it and choose what circle to add your contact to, or create a new circle at the bottom of the list. Notice that your contact does not need to be registered with Google Plus or even have a Gmail address to be added. Everything is done on your side, from within Gmail.

If you are an active Google Plus user or have created many circles, you would probably like to remove some from your list or change the order your that your circles appear in Gmail. You can do that easily from the "Labels" tab under Settings, as previously discussed. It is likely that some circles should be more prominent on Google Plus itself while others should be more visible from Gmail. For example, I have a "technology" circle I often read inside Google Plus but is mostly useless to me inside Gmail, where I have my family and friends circles first.

There's not much else to do with Circles from Gmail at this point, but I believe Gmail will soon integrate an option to email your circles directly from within Gmail. For now you can view all emails from one circle by clicking on it or use a circle as one of your search operators (see chapter 4) .

3.3.2 Why should I use circles?

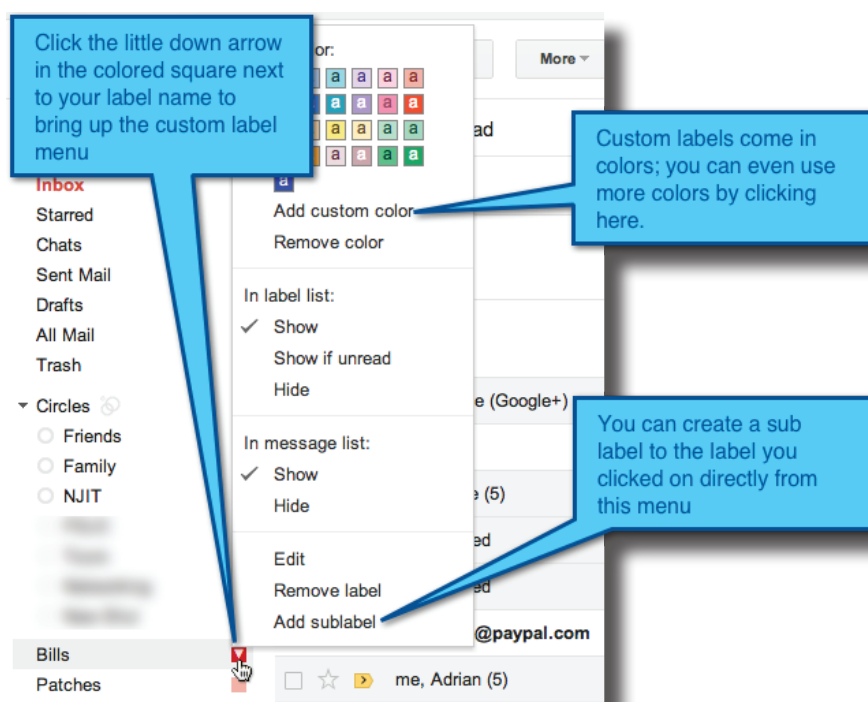
You already know about custom labels (which we're going to cover next) and you've been using them for years. Why bother with circles and Google Plus? Why make things more complicated? I will be honest with you: if you're comfortable with your traditional labels and you find that they work fine for you, stick to them. Circles are not as flexible and useful as custom labels, but I think this is going to change very soon. Chances are that in a couple of months you will find yourself registered with Google Plus and its circles anyway.

Another argument in favor of circles is their transparency and flexibility. You can add contacts to circles simply by hovering over their name with the cursor and change them around just as easily. Since your contacts are probably the most useable organization method in your email (meaning, you most often look for emails from a certain person or group), it just makes sense to have this category of "people labels" exist in its own list and live separately from the rest of the more traditional labels.

3.4 Custom Labels

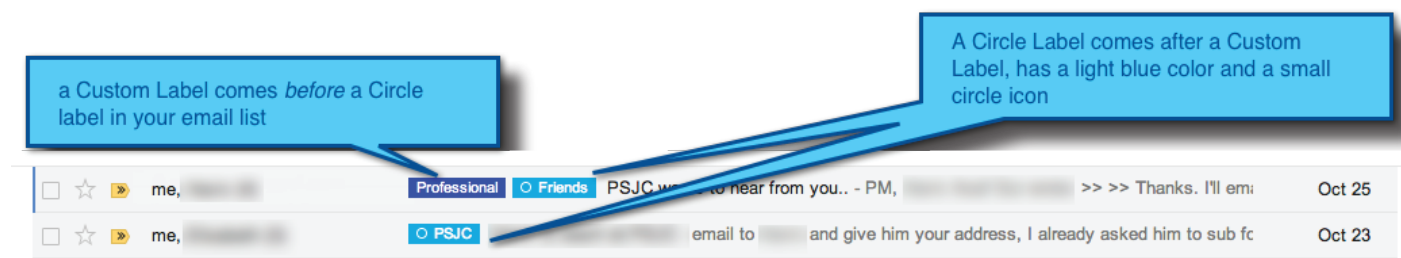
Last in the list to the left of your Gmail screen are your custom labels. You probably have a few of them already. Custom labels remain Gmail's most powerful labels (for now), and you would be wise to learn how to use them well – especially with Gmail's powerful filters.

You can add and edit labels from the Label tab under Settings, just like with any other label, but it's even faster to just click the colored square next to your custom label's name (see figure 10 below). The pop up menu is even more effective than the traditional Labels tab under Settings because it allows you to choose and edit a label's color directly.



Treat your custom labels differently than your Circles. While your Circles tell you who sent you a certain email, your labels are instructions as to what *to do* with this email. For example, work emails with files can be labeled under "forms from work" label, and your bank statements can be filed under "bills" with the rest so you can schedule payments later. The figure below demonstrates the difference be-

tween a Circle label and a Custom Label.

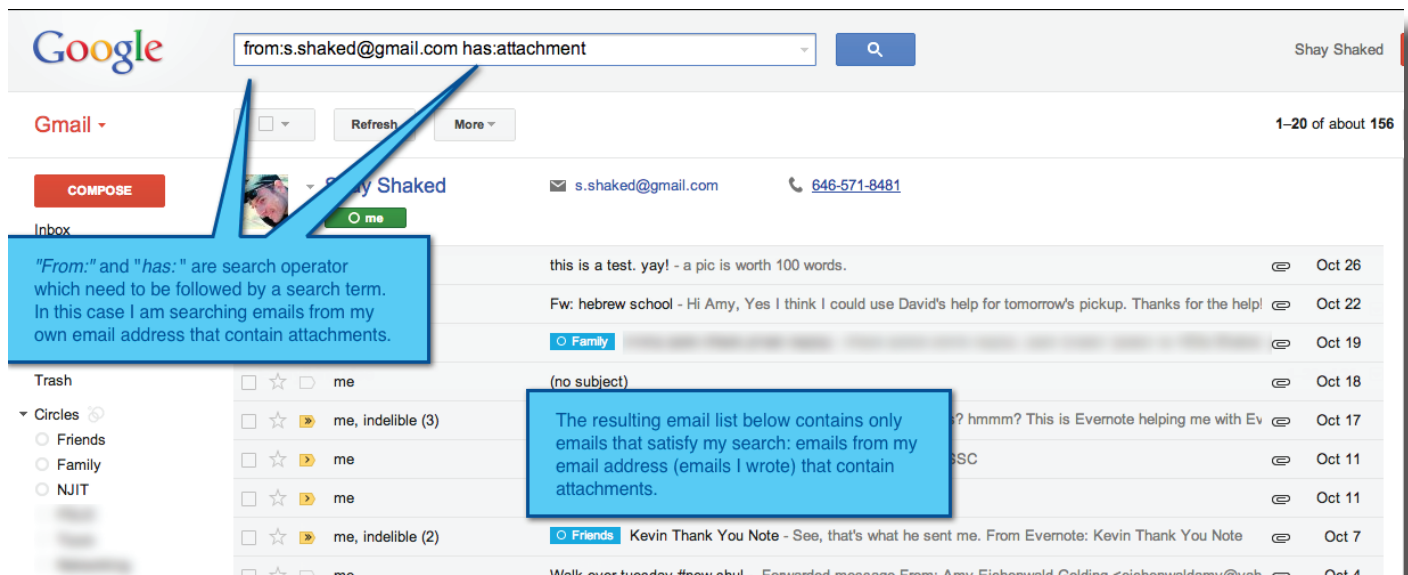


Keep in mind that custom labels can also be nested into each other. In the previous example, your “files from work” can include subfolders for W4 forms, Health insurance information and memos. You can even teach Gmail how to tell the difference and place incoming emails in these folders for you automatically.

4. Feel the power: search and filters

If Labels are Gmail's DNA, its search and filters are its brain. There are very few combinations that would not lead you to the email you seek, even several years back, all within seconds. Gmail calls its list of "rules" to organize emails filters, and since the two are so intertwined together, Google has mashed the two together now, so you can create filters directly from your searches.

First thing first, let's get familiar with Gmail's search window. You are probably already familiar with the more popular search operators, such as "from" or "has:attachment" (and if not, you're in the right place). I am not a programmer, and I learned to use operators without really knowing what they are – all I knew is that these are words that tell Gmail to go and fetch "something." Fortunately, these words are mostly self-explanatory.



Let's jump right into it. Here is a list of Gmail's most popular and useful operators (or "search words," if you will). Just type them directly into Gmail's search bar, followed by a description (no spaces):

from: (add email address or a name)	Find email from someone. Use a name, email address, or part of a name. It all works.
label: (add label's name)	Show emails of certain <i>Custom Label</i> (see chapter 3 about Labels)
has:attachment (nothing to add here!)	Show emails with attachments. Simple and effective.
filename: (add name of file)	Less people know about this useful operator, which can bring up all files with a certain name. You can use a file extension as well, for example, filename:pdf or filename:doc to find PDF files or Word documents within your email
in: (add System Label name)	Very useful if you need to find an email in your trash or spam. Type "in:trash" or "in:drafts" for example.
after: (add a date in a year/month/day format)	This useful operator will show you all emails written after a certain period, but it is a bit confusing to use: you have to follow a format of year first, month second, day last. For example, after:2011/03/20.

before: (add a date in a year/month/day format)	The twin of the “after” operator, it works the same way. After and before are often used together to search in emails written in a certain time period.
circle: (add circle name)	Like label, this filter will find emails from a certain Circle label. The equivalent of clicking on a circle name on the list to the left.

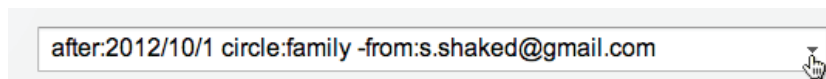
These are not the only operators in Gmail. For a more thorough list, look in [Google’s help webpage](#) on the topic.

The power of Gmail search really comes forward when you combine different search terms together, as shown in the image above. See if you can figure out what the following search would yield: “label:work has:attachment before:2012/10/1 after:2012/8/20”. You can even conduct a search with *negative* terms – that is, excluding certain search items – by including a minus sign. For example: if I was to add “-label:work” above, the search would exclude all results with my “work” label.

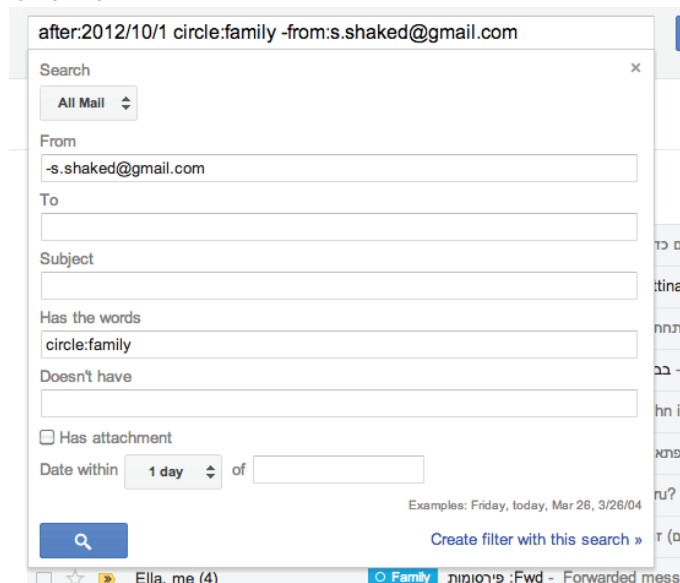
Confused? Take your time and test some of these searches for a few minutes. They are very powerful and you should feel comfortable using them before we move on. Try to memorize the search operators I included in the list above and learn to use these. This is one of the skills that make an advanced Gmail user.

4.1 Turning a search into a filter

Turning into a Gmail search ninja is awesome, but what about saving these searches? What if you want to conduct a search that automatically finds all your Word files in your Gmail often? Better yet, what if you want this search to run *automatically*? Wouldn’t it be nice if Gmail could find these Word files for you every time and *do* something with them automatically, like send them to a friend or label them a certain way? Well Gmail can do these things, and easily. These automatic commands to Gmail are called filters. In order to make a search into a filter, click on the little grey down arrow to the right of the search box.

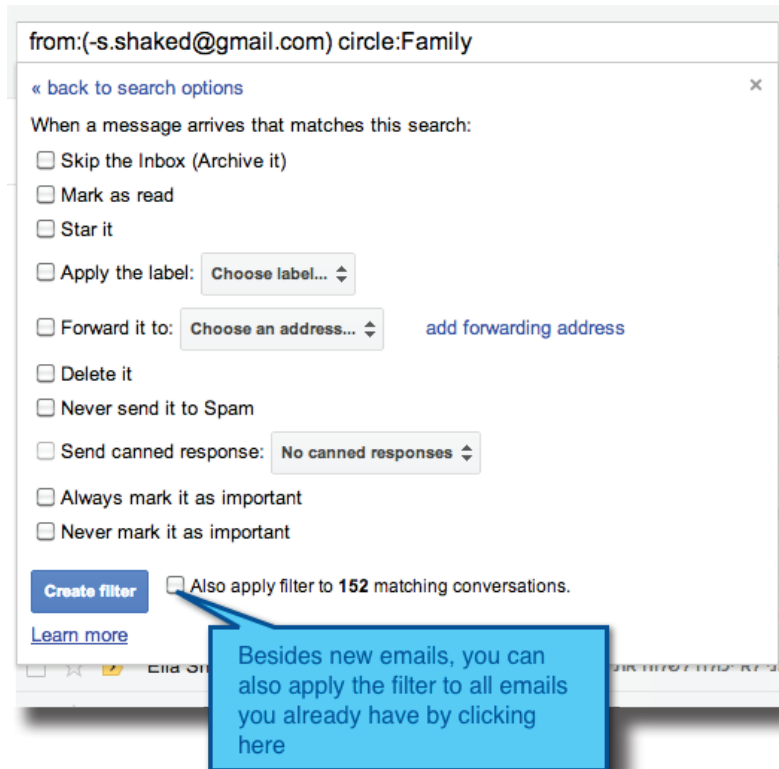


In the image above, the search will include all emails after October 1st, 2012, sent from my family (my family circle), but *not* from me. In other words, it would exclude all emails I sent to my family and only show me emails I received from my family. Then, clicking the down arrow to the side as seen in the figure will result in the filter pop-up window.



You will notice that Gmail automatically fills the lines defined in your search already, in this case, the “from” line and the “has the words” line. Gmail also tries to make things easier for you and include an option to choose a time frame instead of using the before: and after: operators, but I personally find this option to be confusing.

What you’re creating now is your *trigger*, or the event that would start the search; in other words, in the above case every time Gmail detects an email after October 1 2012 from my family circle that is *not* from me, it would perform a certain action. We’ll pick an action in the next step. Click “create a filter with this search” to go on.



The next window will present you with a list of available options. You can choose to delete, archive and forward these emails automatically. You can apply them to a label or even set Gmail to answer these emails automatically with a premade email just for that purpose. When you are done, click the blue “create filter” button, and you’re done. If you chose to apply all the emails already in your Gmail, the actions you just selected will also apply to all existing emails.

You can always access your existing filters them from the “filters” tab under Settings. From there you can choose to edit or delete any filters.

4.1.1 Examples to useful filters

Here are some of the filters I have used in my Gmail for years. They’ve proved to be very useful.

Semi-junk mail filter:

Some emails are not exactly junk, but also do not require your attention. Bills and credit card statements, Facebook notifications, emails from the office that you know you might need one day, or even just a family member who floods your inbox with pictures of their cute new puppy. You don’t want to delete these emails completely, but you don’t want to sort through them immediately either.

Construct a search with the “from:” operator, and add emails with a comma to add more email addresses. For example, “from:auntsusie@gmail.com, uncleBob11@gmail.com, auntjess223kar@gmail.com” will show you emails from all of these people (alternatively, you can create a circle to include all

of these people). Click the down arrow and create a filter that automatically marks these emails as read and puts them in the archive. Next time Aunt Susie sends a picture of her puppy, it won't even be in your inbox – but if she calls you and asks you about it, it can be found in your archive quickly.

Mark down Amazon delivery notifications:

If you use Amazon a lot, you probably get many emails from them: promotion, receipts, requests for feedback... You could easily create a filter to send all of these to your “semi-junk” label, but the problem is that you still want to know right away when Amazon shipped something to you so you have the tracking number available. How do you do that?

Search for “Amazon” in your Gmail and click the down arrow to create your filter. The word “Amazon” brings up every email ever sent to you from amazon.com, so the next step is to include additional words that only exist in Amazon shipping confirmation emails. In the “has the words” line type in “has shipped!” in quotation marks (“ ”). This tells Gmail that you are looking for the word combination “has shipped!” exactly as it appears in the text: two words, space, and exclamation mark. You will notice the list shrinks considerably to include only emails from Amazon that include the phrase “has shipped!”

Still, some emails manage to get through, especially if you sell items on Amazon – you'll get a message asking you to ship your items. No problem. Just include the word combination “ship now” in the “doesn't have” line, and watch your list shrink further. Looks pretty good now, doesn't it? Time to create the filter: click “create filter with this search.”

Next you can apply a label to these emails, such as “shipped from Amazon.” From now on all your items ordered from Amazon will be neatly delivered to this label and you could easily track your shipments in the future. Apply the filter to all existing emails and you could search even into your past. Great stuff, isn't it?

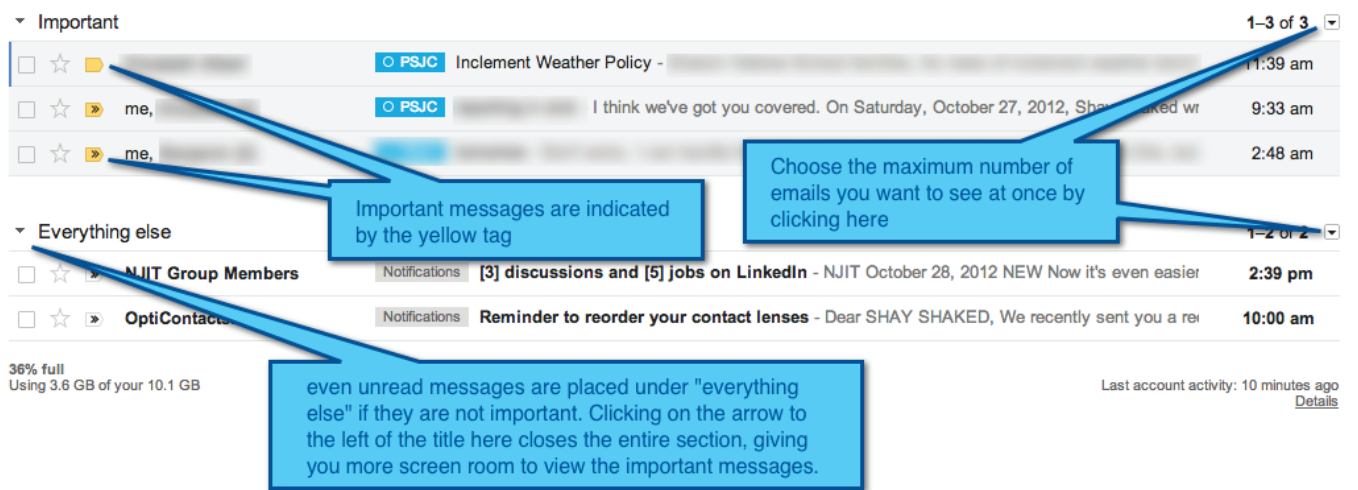
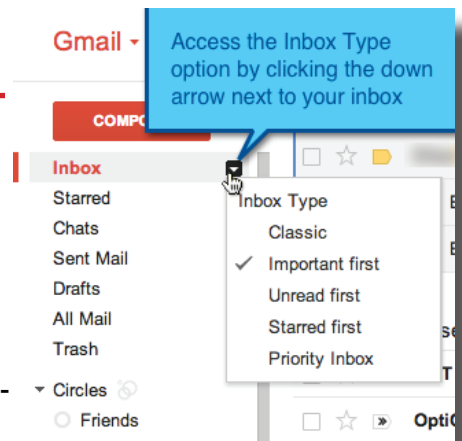
5. Productive Gmail

Now that you know your way around Gmail and how to use its most powerful features, it's time to look into additional fun tweaks that truly make Gmail a productivity tool.

5.1 Priority inbox and its variations

In its quest to make Email work better, Google included many advanced algorithms in Gmail. One of these great features are the different inbox styles, of which there are five: Classic, Important first, Unread first, Starred first and Priority inbox. What each one does ranges from straightforward (classic, unread first) to slightly tricky to explain (Priority Inbox). The best way to learn about the different inbox styles is simply to experiment with them and see what works best.

While it seems that the Gmail team and many Gmail masters out there argue in favor of the priority inbox, I don't find it very helpful. Priority inbox sorts through your emails automatically and decides what you should read first and how, but doesn't split your email list as well as other inboxes types. My favorite one is the "Important first" inbox, which, combined with smart tags (we will get into that next), does an excellent job at organizing your inbox for you.



The difference before you switch to the "Important first" inbox and after is so striking you will never confuse your inbox and your archive ever again. All messages you deem important will show at the top list, and everything else will go to the lower list, even if you haven't read it - and let's face it, do you even care to read all these notifications you get from Twitter, Facebook and LinkedIn? Didn't think so.

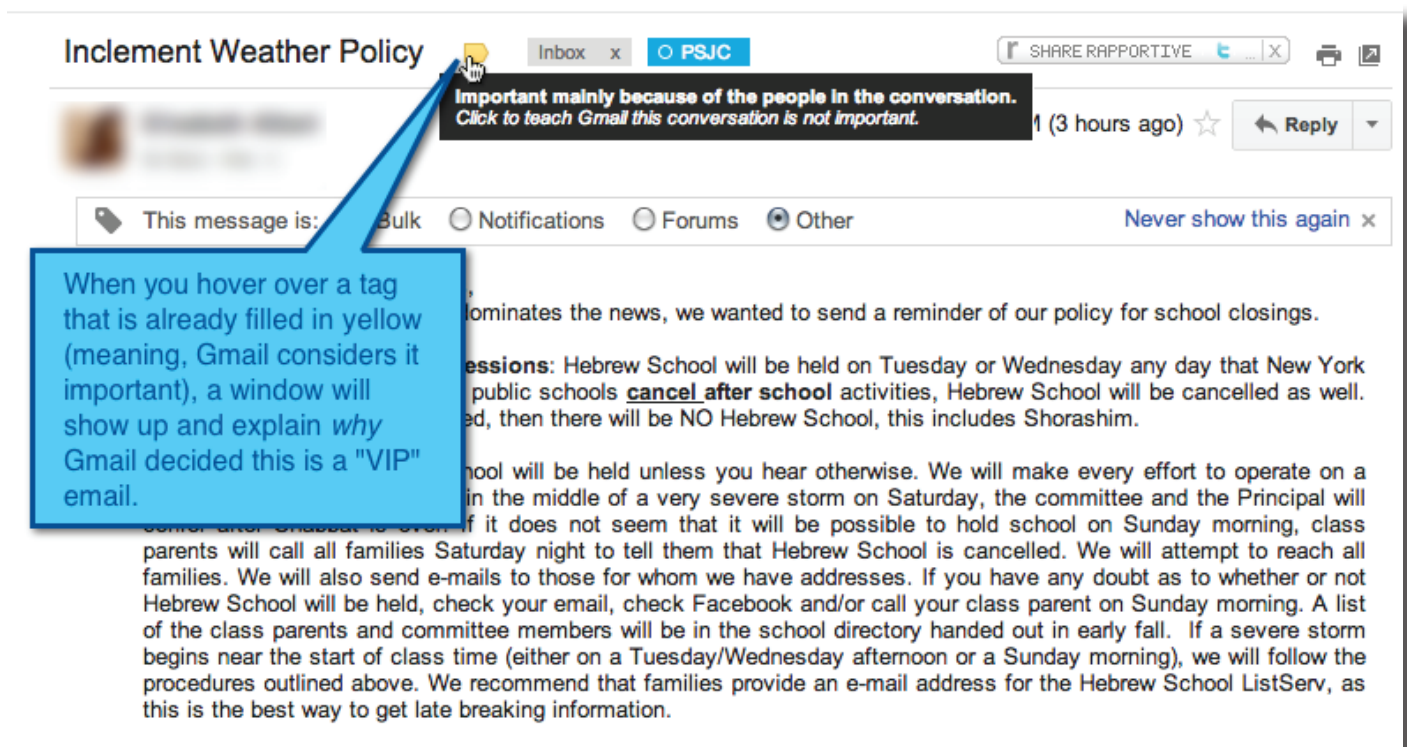
5.1.1 VIP emails vs. regular emails

When Gmail first launched, before there was a priority inbox at all, emails were deemed important by a flag on Outlook or a star in Gmail. While this still remains the best and simplest way to "bookmark" emails instantly, Gmail now understands some of your contacts are more important to you than others.

As you can see from the picture above, my important emails are marked by a yellow tag. Gmail decides which emails are more important based on how often you read and reply to emails from a certain contact and how you interact with them. Gmail's mechanism is pretty good on its own, but you can interfere directly and give some emails VIP status by marking them as important - alternatively, you can "strip" emails from their importance. Be careful: the division is so effective some family members

(or your boss) might be offended for not being important enough to make it to your top list!

You can mark emails as important or not important by clicking the little tag icon next to them in the main email list or at the top once inside the message (see figure below).



As you click and adjust your emails, Gmail will also adjust its own algorithm and respond accordingly: there's no need to mark *all* messages from a certain contact important; Gmail will catch on after a few manual changes and mark them for you.

5.1.2 Starring emails

As mentioned above, stars (the equivalent of flags in Outlook) have been around since the beginning, and are still very effective to mark emails quickly. In order to star an email just click the star icon next to it in the main email list, right next to the importance "tag" described above.

Why would you want to star emails if you already have such an advanced feature like priority inbox? Because sometimes you just need to remember something quickly or remind yourself you want to do something about a particular email rather than just deem a group of emails important. Keep in mind stars work both in your important emails and in your no-so-important emails just the same.

For example, star emails you can't answer right away but want to reply to later in the day or star emails that contain important information, such as addresses and phone number when you'll need later. You can conveniently archive starred emails to get them out of your inbox and access them later from the "starred" System Label at top left. When you're done doing whatever it is you need to do with the email, unstar it by clicking the star icon again.

5.2 Keyboard shortcuts

I'm a huge fan of keyboard shortcuts. Many people seem to underestimate the power of keyboard shortcuts and wave them off as an annoyance at best (who wants to remember what keys do what?), but I will tell you that you cannot become an effective Gmail user without mastering at least a couple. There's a difference of night and day between using your mouse for everything and knowing how to

quickly organize an inbox in seconds with these shortcuts (they are called shortcuts for a reason, after all).

You can always access the list of keyboard shortcuts in Gmail by pressing a question mark, or shift /, as long as you are not composing an email (which of course would simply insert a question mark into the body of your email). Before we can use Keyboard shortcuts in Gmail, however, we have to make sure they are activated. To do so, go to Settings and enable keyboard shortcuts (second option from the top) if they are not enabled.

Navigation:

- *Press the j & k keys to move up and down the email list on the main screen.*
- *Press x to select a conversation ("mark" or highlight it).*

Selecting emails this way allows you to quickly choose emails you want to delete, archive or move to another label. After some practice you will find that selecting emails this way is much faster than using the mouse and a smile will spread on your face. As you start understanding the power of keyboard shortcuts, you will be ready for more.

Actions:

- *Press enter to open an email and read it.*
- *Press e to archive an email.*

This works directly from inside the email or from the emails list on the main screen. Try to select multiple emails (by moving up and down the list with j and k and selecting messages with x) and press e. Poof!

- *Press # (shift 3) to delete emails.*
- *Again, this works on multiple emails from the main list or from inside an email you have open.*
- *Inside an open email, press r to reply to sender; press a to reply to all senders.*
- *Inside an open email, press g and then i to go back to the inbox (think **g**o to **i**nbbox).*

These are the crucial shortcuts. You can probably see how with a few taps of your fingers you can now select multiple emails, reply to all senders at once, and delete a bunch of emails quickly. Practice these a few times before you move on to the really cool shortcuts.

The really cool keyboard shortcuts

- *Inside an open email, press shift+r to reply in a new window; press shift+a to reply to all senders in a new window.*

This is extra helpful on small screens and netbooks, where you need extra space to read and reply to an email. It also blocks out chat and labels – allowing you to concentrate on the email.

- *Inside an open email, press g and then k to go to your task list.*

Did you even know Gmail has a task list? We will cover it next.

- *In the main list of emails, mark an email (x) and press shift+k to attach the email to a new "to do" item on your task list.*
- *This feature only works with keyboard shortcuts! There is no mousey way to do it.*

- Press *g* and then *p* to bring up the phone window and make a phone call.
- Press *shift-f* to forward an email.
- Press *shift-u* to update an email thread (to see if you got a reply while writing your own email).
- Press *+* (*shift =*) or *-* to mark an email important or not important (as discussed above).
- In the email list window, press *** and then *a* to mark all emails; press *** and then *d* to unmark all.

Don't feel obligated to know *all* shortcuts. Train yourself to memorize those that you use often and make yourself use them for a week (don't use the mouse!) until they become a second nature. You will find that you don't want to go back to using the mouse in Gmail and that you are much faster handling your emails with shortcuts.

5.3 Tasks and To Do lists

Gmail's tasks list is somewhat hidden, and Google doesn't make it noticeable enough in Gmail or Google Calendar (where it also resides) for people to see it and use it. Tasks in Gmail are very basic and stand somewhat in contrast to the otherwise fully-featured email app, but if you want to jot down a to do list that can integrate with your emails you might want to give it a look.

Access Gmail tasks by clicking the down arrow next to the Gmail header in red at the top left; this will bring up a menu which will lead you to tasks or contacts. Your tasks will appear at the lower right corner in a window that resembles the chat pop up. Alternatively, you can access tasks by pressing *g* and then *k* anywhere in Gmail, as mentioned previously.

Gmail tasks can actually be pretty useful once you get used to them. You can easily create a task and then nest tasks inside it by "tabbing" new tasks to the right, making them subtasks of the original one. This is useful for simplifying a project by breaking it down into smaller steps along the way. Since you can connect emails directly to tasks (*shift-k*) you can include useful information inside that task, such as links, contact information and even files. When a task is done, you can check it off and be rewarded by a strike-through passing through it, crossing it off as complete.

Clicking on any task will open an option to add notes to the task or choose a due date; this comes in handy especially if you work with Google Calendar, as the task lists sync seamlessly and would show up on your calendar as well.

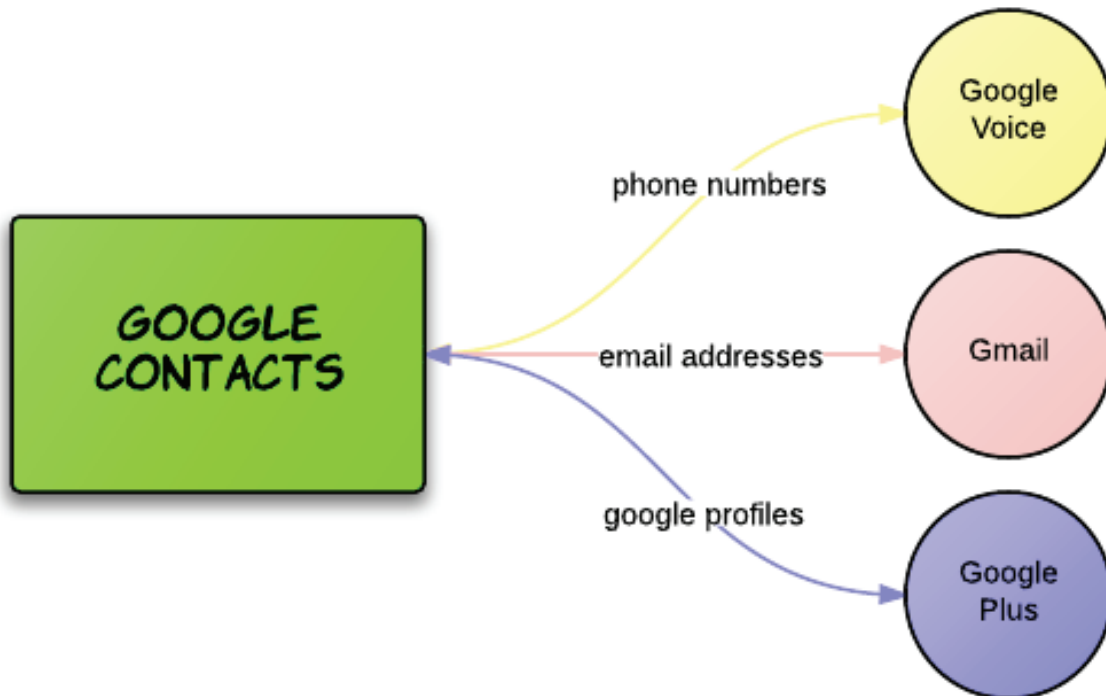
To do lists and tasks are a whole different ball-park, which probably requires an additional manual. If you're serious about managing tasks and to do lists I would actually advise you to stay away from Google's minimal tasks and project management lists and look somewhere else, at least until a few more improvements are implemented.

5.4 Efficient Contact List

Like the Gmail's tasks, Gmail's contact list seems somewhat unfinished or rushed, but with one important difference: Google Plus. We've already discussed the importance of Google Plus, and Google went into great length to integrate your Gmail contacts with the new service, but there are still many glitches.

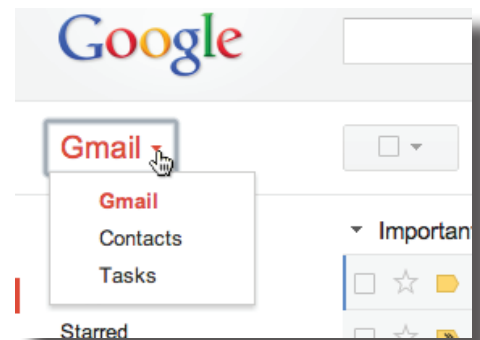
The first issue you'd come to realize, especially if you pick up on making phone calls in Gmail and Hangouts, is that the contacts section suffers from a split personality. On one hand you have a plain looking contact list dominated by email address and phone numbers in Gmail, on the other you have visually rich circles in Google Plus. Bridging the two together can be a bit tricky, but unlike tasks – which can be left alone – it is crucial to keep your contact list up-to-date and clean.

To understand the nature of the problem better, you have to look into Gmail's history. Each one of the Google products that connects to your contacts was developed separately, with different information needed for each application. As a result, the Gmail contact list you see today is a mixed hybrid of at least three different products: Gmail, Google Voice, and Google Plus – and each of them stores contacts a little differently.



5.4.4 Managing your contacts

To access your contacts, click on the down arrow next to the “Gmail” on the top left, as you did with your tasks, or press g and then c from your inbox. I am not going to spend too much time talking about how to add information into your contacts (if you really need help with this, look into the Ultimate Gmail Guide mentioned previously), but rather, I will show you what a good contact page looks like, and why you want to have them set up this way.



Each one of your contacts, especially the more frequent ones, should have a phone number, an address and an email address written down. You should include a picture as well – one that would help you identify the person quickly (some of your friends might have different pictures already in place. Don't feel bad about changing them and uploading one of your own; they will never notice, and chances are your picture would be much more helpful than theirs).

Remember that Google contacts sync to your Android smartphone automatically: the pictures, email addresses and phone numbers are what displays on your phone when they call, send an email or show up on Google Maps search results when you want directions to their home or office. Keeping a clean and informative contact list is key in Gmail to make phone calls, send text messages and start Hangouts.

5.5 Additional Labs features

Gmail contains many optional features that can further enhance your productivity. They are acces-

sible under the Labs feature in Settings. Below I will name a couple that I find helpful, organized by their order in the labs tab. Feel free to explore and find more on your own. Click on the labs icon to get started!

Default text styling: This feature turns on an option to choose a default font and font color in your outgoing emails. It is helpful to differentiate your own response from those that are automatically pasted into the body of replied emails.

Smart labels: One of my personal favorites, this handy feature allows Gmail to “guess” which email received are notifications, replies from online forums and bulk (newsletters and such). Gmail automatically adds labels to each kind and does a pretty good job at guessing. It will also ask you to “train” it by choosing the right label for a few days when you turn it on. Try it and see how it affects your organization.

Canned response: A godsend if you receive many emails to which you reply the same way. Turn it on, and then compose an email as a “template.” Save it, and use it next time you want to respond quickly. This is excellent for thank you letters, for example, or for newsletters.

Default reply to all: Turning this on means you’ll reply to all senders by default (how many times have you forgotten to include or CC someone from the original email?). And don’t worry: you can still reply to one person or selected individuals if you want to.

5.6 A word about plugins

It’s been a tough decision, but I decided not to include browser-based plugins in this manual. Over the years I have tested and tried out different Gmail plugins, only to uninstall them several weeks later. Plugins are powerful: they can be very useful, but also dangerous, since they allow a third party (often a shady third party) to access your email account and do whatever they want with it. This can lead to weird issues with your interface (search bar shrinking, Gmail not loading completely) or even cause you to be locked out of your account for “suspicious behavior.”

Up to this point, I haven’t found a single plugin I can’t live without. The only one that remains for now is [Rapportive, a plugin that connects to your different social networks and collects information about the contact you writing an email to](#), showing latest tweets, Facebook profile, blogs, etc. But even this very handy plugin is in danger of being kicked out of my Gmail because it slows it down and causes Gmail to not load fully at times.

Use plugins with caution. Unlike many other features *inside* Gmail – which I encourage you to explore – plugins, in my opinion, should be mostly left alone. There is little Gmail can’t do without them.

Conclusion

That’s it! I hope you’ve become a better Gmail user by reading this, and that it makes your life just a little bit easier. Enjoy!



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