Mail Act-On 2

Quick Start Guide

Version 2.1

indev software

What is Mail Act-On?

Rules in Apple's Mail application are a good way of managing your messages. When Mail receives your messages, it automatically applies its rules to move messages, run scripts, set colors and more.

However, sometimes it is too automatic. Many messages require your intervention to make critical decisions about the actions to take. These messages fill up your inbox, demanding your attention and your manual application of a system of organization. Whether the action is to file a message, flag it for later response, or to apply a script, organizing your mail manually takes time, often involving several steps requiring a great deal of work with Mail's interface.

Mail Act-On gives you the power to efficiently organize your messages after you have made your decisions of how best to handle them. With Mail Act-On, you define rules to apply actions and you run those rules on selected messages with simple keystrokes, saving you time and effort.

This quick start guide will help you with the basics of Mail Act-On 2 and give you tips to streamline and optimize your mail management.

What is new with Mail Act-On 2.1?

If you have used the free version of Mail Act-On 1.x, you will find Mail Act-On 2 a significant improvement:

- The interface has been carefully tailored to allow maximum efficiency. You can now apply rules to messages in rapid fire sequence to save even more time. (See the advanced technique of locking the Act-On window)
- Mail Act-On 2 now lets you undo recent rules.
- You can now move or copy messages to arbitrary folders on demand even if you don't have a rule defined.
- It is easier to define and organize your Act-On rules.
- You can create Outbox Rules to apply rules when you send messages, letting you organize your outbox.
- It now integrates with MailTags and has an extensible architecture so it will integrate with other applications in the future.

Mail Act-On 2.1 adds preferred mailboxes for moving messages, and the powerful new Apply Act-On rule action. This new rule action lets you apply followup actions to a subset of messages or earlier messages in a correspondence. See the Advance Techniques 4, 5 and 6 in this quick start guide to learn how to make effective use of this new rule action.

System Requirements

Mail Act-On requires OS X 10.5.4 or higher
Mail Act-On is compatible with all POP and IMAP accounts.

Installation and Registration

Mail Act-On is a plugin to Apple's OS X Mail application. Unlike most applications for OS X, Mail Act-On needs to be installed in the correct location to be used.

Open the "Install Mail Act-On 2" application to place the plug into the appropriate folder for Mail to find it when launching.

Uninstalling Mail Act-On

To uninstall Mail Act-On simply run the "Uninstall Mail Act-On" application.

Registration

Mail Act-On 2.1 requires a registration code to use beyond its 30 day trial period. You can purchase a registration code at our store at http://www.indev.ca/store. To enter this code, visit the Register Tab in Mail Act-On's preferences.

### Upgrading from Mail Act-On version 1

Mail Act-On 2 stores its rules differently than Mail Act-On version 1. The first time you start Mail with Act-On 2, your rules will be converted to the new format. You should check your converted rules to ensure the keystrokes, titles, criteria and actions were all correctly interpreted.

Using Mail Act-On

The main interface for working with Act-On is the Act-On Window. The window is a floating window that gives a menu of actions.

Tap the F1 key to access the Act-On Window.
(Depending on your system preferences, you may need to use the fn +F1 key combination)
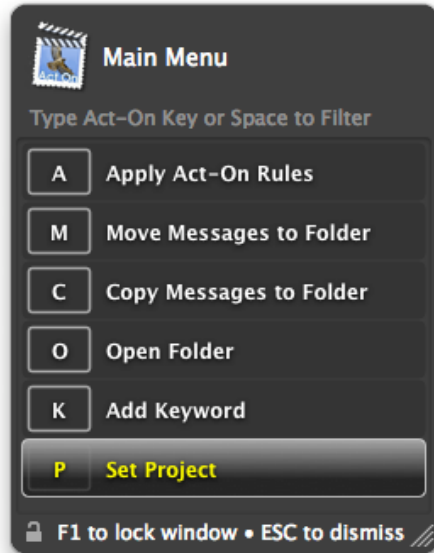
Use the mouse, arrow keys + return, or the listed shortcut keys to select an option.

By default, you should see 5 items on the Main Menu. If you have MailTags or other Act-On Extras installed you will see additional items.

Tip

Change the Keystroke

Change the keystrokes that show the Act-On window: Open Mail's preferences and select Mail Act-On Preferences. The Menus tab lets you set different keystrokes for different menus

Tip

Resize and Position

The Act-On Window can be resized and positioned. Act-On will remember where you prefer to have the window.

Applying Act-On Rules

An Act-On (or "keystroke") rule is applied to your selected messages when you choose the rule from the Act-On Rules menu. If the message satisfies the criteria, the actions of the rule will be carried out. These actions can be anything carried out by a regular mail rule.

Use the mouse, arrow keys + return, or the listed "Act-On" keys to choose the rule to apply.

Recent rule applications can be undone. If you apply the wrong rule, just select Undo from the Edit menu to reset the messages back to their original state and location.

Apply Act-On Rule...

Type Act-On Key or Space to Filter

Y	Color Message Yellow
F	Flag Message
A	2 Rules
	Archive Family
	Archive Message
⇧D	Mark Done and Archive

🔒 F2 to lock window • ESC to dismiss

First Time Users

You will have 2 rules to get you started. You can edit these or create more rules within Mail's rule preferences.

F2 Key   Short cut

Access the Act-On Rule Menu directly by pressing the F2 key.

Tip   **Control Key Combo**

Remember the Act-On Key for a rule and apply it using the control key to bypass the Act-On window. If the Act-On Key is A, then ctrl-A will apply the rule.

Moving and Copying Messages

Use Mail Act-On to quickly move or copy a message to an arbitrary mailbox and avoid using your mouse to drag and drop.

After selecting Move Messages… or Copy Messages… from the main Act-On menu, select the destination mailbox and your messages will be moved or copied.
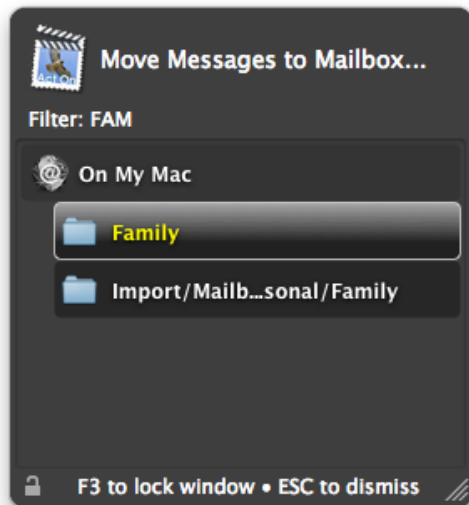
Type parts of your mailbox name or path to filter the number of destinations to choose from. (You may need to tap the space bar to activate the filter)

Mail Act-On will also keep track of and list recent destinations at the top of the menu. Tapping the number key corresponding to the destination is a quick way of moving messages to frequent folders.

Move Messages to Mailbox…

Filter: FAM

@ On My Mac

📁 **Family**

📁 Import/Mailb…sonal/Family

🔓 F3 to lock window • ESC to dismiss

Moving Message to preferred Mailboxes

Mail Act-On 2.1 adds preferred mailboxes to the destinations that you can move messages to. Up to 10 mailboxes can be configured as your preferred mailboxes in. When you access the associated Act-On Window, use the number keys to select the destination. These associated number keys won't change so you can let your fingers develop that physical memory for quick filing in the future.
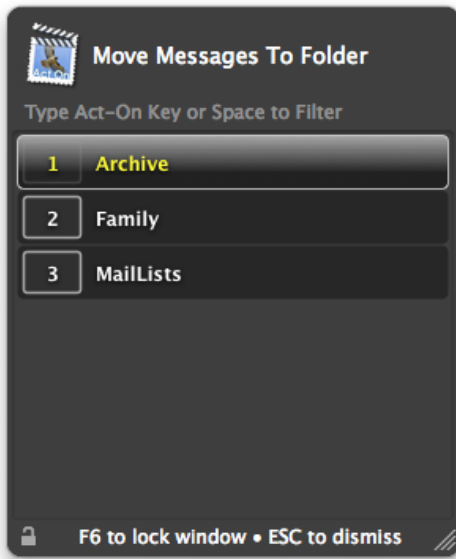

Select your preferred mailboxes in Mail Act-On preferences.

Managing your Act-On Rules

Mail Act-On enhances Mail's rule editor to provide two new types of rules: Keystroke Rules, and Outbox Rules. Mail's regular rules are renamed "Inbox Rules" to reflect their functionality better. When you view Mail's rule preferences you will see three tabs reflecting the types of rules.
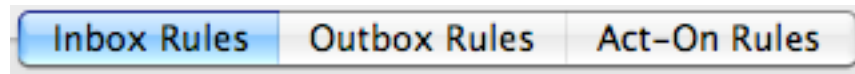
Act-On Rules

An Act-On Rule is configured in the almost same way as a regular Inbox Rule. The only exception is the ability to record a keystroke for the rule. The Keystroke can be almost any key on your keyboard and any key combination that uses the option key and/or the shift key.
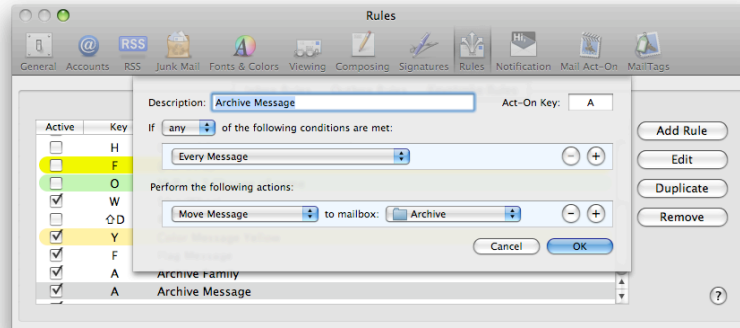
Outbox Rules

Mail Act-On gives you the power to apply rules to messages when you send them. This feature lets you easily organize the mail you compose and the replies you make.

These Outbox Rules are configured in the same manner as inbox rules. Just add or edit a rule in the Outbox Rules tab and it will apply to your messages when you send them so long at they satisfy the criteria you specify.

Tip
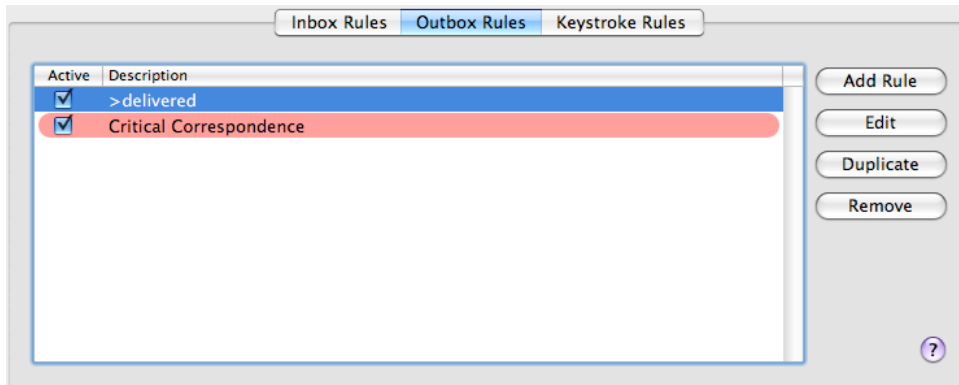
On Demand Outbox Rules

Use MailTags with Outbox Rules for on demand message filing flexibility.

See the advanced techniques for more information

| Inbox Rules | Outbox Rules | Keystroke Rules |

Active	Description
☑	>delivered
☑	Critical Correspondence

Add Rule
Edit
Duplicate
Remove

?

Preferences

Mail Act-On has a number of preferences to customize your use.

Open Mail's preferences and look for the Mail Act-On item in the preference toolbar.

General Preferences

Locking the Act-On window. By default the Act-On window will disappear after applying the desired action. Change these settings to make the window disappear only when the escape key is tapped. For more information on locking the Act-On window, see the advanced techniques.

Results window. Use these preferences to set the location of the result window and the duration it appears after you apply an action.

Checking for updates. Mail Act-On can automatically check for updates when Mail Launches. When a new version is available you have the option to download and automatically install the update.
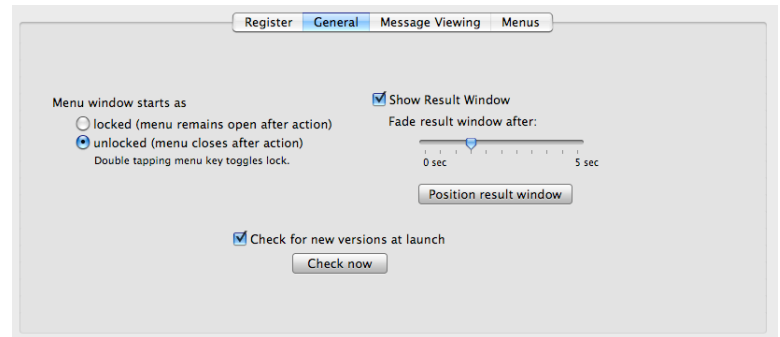
Message Viewing

Without Act-On Mail will mark a message read as soon as it is display in the preview window. Often you just want to skim the message and not mark it as read immediately. The Message Viewing preferences lets you set a delay before marking the message read. Further options changes how the spacebar advances your message selection.
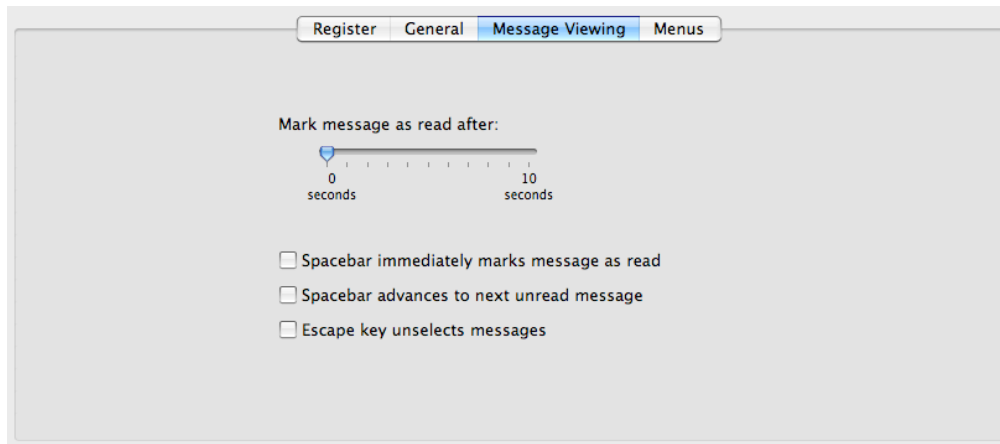
Menus Preferences

These preferences control the keystrokes to display each of the different menus. Double-click an item in the Menu Key column to record a new key or key combination to show the corresponding Act-On menu.

Many of the menus have specific preferences related to actions they provide. Select a menu in the table to change these preferences.
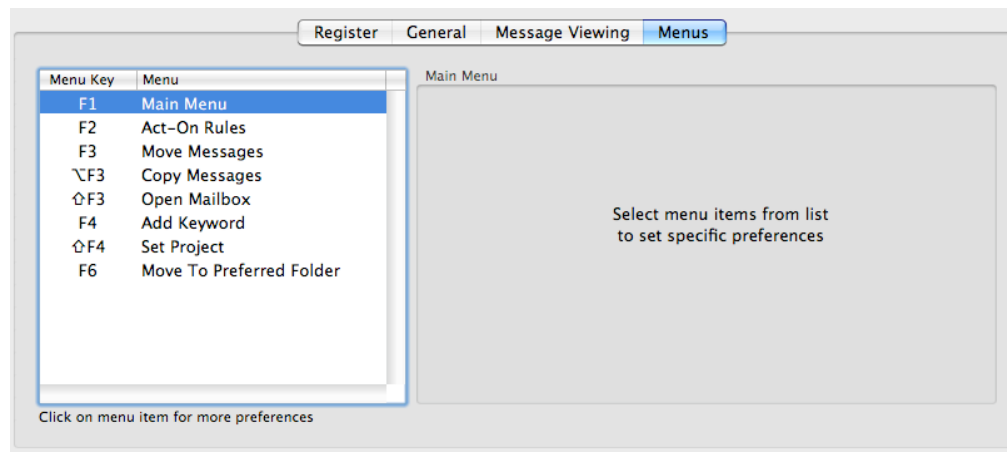
Advanced Techniques

Mail Act-On gives you a tremendous amount of power to manage your mail with its basic functionality. When you are ready you can increase your usage with a few techniques that may not be initially apparent when you first use Act-On.

These techniques often involve setting up systems of rules where a single keystroke could trigger multiple things to happen. With a finely honed system of Act-On Rules and techniques, the time it takes to manage your email will be reduced to fractions of seconds.

Advanced Technique 1: Locking the Act-On Window

Locking the Act-On window keeps the window open after you apply an action so you can select other messages and quickly apply the same or different actions.
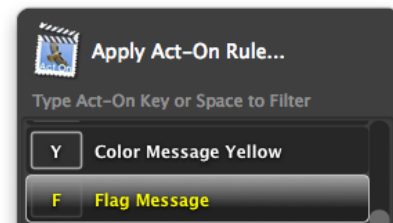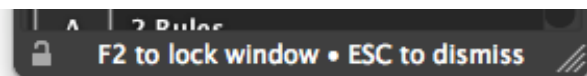

Toggle the lock by tapping the menu key you used to display the window. (The bottom of the Act-On window tells you which key)

If the Act-On window is locked, it remains open but the control belongs to the message window. Use the up and down arrow keys to select different messages and the right arrow key (or return) to apply the current action to the newly selected messages. Alternatively, use Act-On keystrokes to select and apply a different action to the message selection.

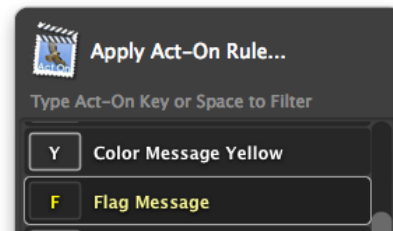The Act-On window has control. Arrow keys select actions.

When the arrow key controls message selection, the backward arrow key returns control to the Act-On window so the arrow keys can be used to select different actions. The forward arrow key will then apply the selected action and return control back to the message window.

With a little practice, you can use the keyboard to select and apply a variety of different actions to different messages in quick succession.

The message window has control. Arrow keys select messages.

Tap the escape key to hide the Act-On window.

Advanced Technique 2: One Keystroke, Many Keystroke Rules

Use the same keystroke for multiple rules to create a sophisticated system of different actions that apply to messages depending on the criteria that a particular message satisfies.

For example, create 2 rules:

☑	A	Archive Family
☑	A	Archive Message

With the settings:

Description: Archive Family	Act-On Key: A
If **any** of the following conditions are met:	
Sender is member of Group / Family	⊖ ⊕
Perform the following actions:	
Move Message to mailbox: Family	⊖ ⊕
Stop evaluating rules	⊖ ⊕

Description: Archive Message	Act-On Key: A
If **any** of the following conditions are met:	
Every Message	⊖ ⊕
Perform the following actions:	
Move Message to mailbox: Archive	⊖ ⊕

Now if you select multiple messages to archive, a single Ctrl-A keystroke will move the messages from your family to the Family mailbox, and all other messages to the general archive.

With a little planning, you can create a sophisticated system of rules that efficiently places your messages where you want them.

Advanced Technique 3:
MailTags + Outbox Rules = On demand sent mail organization.

When you have Indev's companion product, MailTags, installed, use the ability to tag an email as you are composing it to instruct Mail Act–On to apply specific outbox rules when you send the message.

Create an Outbox rule "File in Critical Correspondence" and set the criteria and actions similar to below.

Now when you want an outgoing email to be filed automatically, just add the "Critical Correspondence" keyword to the message before sending it.

Advanced Technique 4:
   Chain rules together to build AND/OR rule logic.

Without Act-On, Mail's rules cannot combine OR and AND logic. For example, you apply rule actions if a "Message is From Bob, Susan or Sam, and message has "Important" or "Urgent" in subject. The only way to do this is to create multiple rules, one for each sender.

Mail Act-On 2.1 introduces a powerful new rule action -"Apply Act-On Rule". This gives a rule the ability to run a followup rule. Using this new action, you can get the AND/OR Logic that would be impossible otherwise.

For this example, create an inbox rule with criteria "Important or Urgent is in subject". This rule then applies the second rule on the current messages with criteria "Message is from Bob, Susan, or Sam" (any criteria). Since only the messages meeting the criteria of the first rule will be evaluated against the second rule, the AND logic is achieved.

In fact you can apply multiple second rules for more sophistication.

Description: Message is Urgent or Important

If any of the following conditions are met:

| Subject | Contains | Urgent | − + |
| From | Contains | Important | − + |

Perform the following actions:

| Apply Act-On Rule | Message From Bob, | Current Message | − + |

First (Inbox) rule checks the first set of OR conditions. if a message matches conditions it is send to the second rule,

Description: Message From Bob, Susan, or Sam   Act-On Key:

If any of the following conditions are met:

From	Contains	Bob	− +
From	Contains	Susan	− +
From	Contains	Sam	− +

Perform the following actions:

| Set Color | of background | Red | − + |

Second rule checks the second set of OR conditions and applies the desired actions.
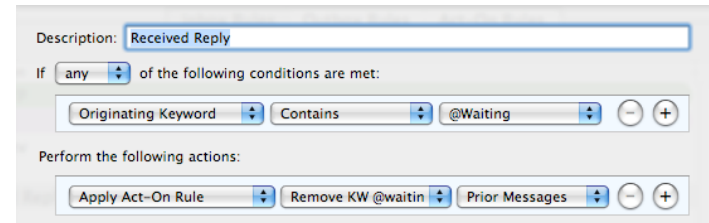
Advanced Technique 5:
   Use Apply Act-On Rule action on prior messages to better manage correspondence.

The "Apply Act-On Rule" rule action also lets you apply the followup rule on prior messages to the messages currently receiving the initial rule. The Second Rule will evaluate the prior message using its criteria and take its actions. Combined with MailTags, this is useful for managing the messages for which you are awaiting replies.

For example. When I expect a reply to a message I am writing, I add the "@Waiting" keyword as I am composing the message.   I can create a smartmailbox showing me all the messages I am waiting on.

I create an Inbox or Act-On rule that sees if the prior keyword is "@Waiting". If it is, it runs the Act-On Rule "Remove KW @Waiting" on the Prior Messages. The " Remove KW @Waiting" simply removes the keyword. Now when a reply comes in, the inbox rule will see that this is an expected reply and automatically finds the message I sent earlier and removes the "@Waiting" keyword.
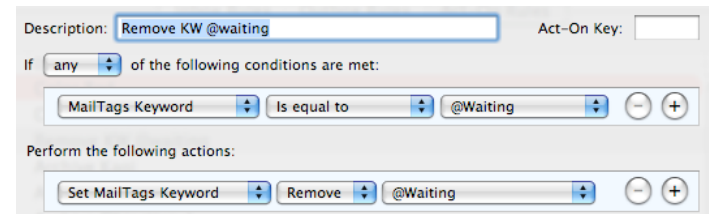

Inbox rule that looks for a reply. It runs the remove waiting keyword Rule on the prior messages

Act-On rule (without key) that removes the waiting keyword. This will be run on the prior messages.

Advanced Technique 6:

Use Apply Act-On Rule action with outbox rules to automatically file messages after your reply to them.

This technique is very similar to the previous one except it is built as an outbox rule and is applied whenever you send a message. When you reply to a message, Mail Act-On will consider the message you are replying to as the prior message for the "Apply Act-On Rule" action. You can apply multiple Act-On rules rules from the outbox rule to meet different filing criteria. Because each of the Act-On rules have their own criteria, only the ones relevant to a message would take effect. The rules are applied in order and if any rule has a Stop Evaluating Rules action, further rules will not be applied.

Description:	Archive Message Being replied to

If any ⇕ of the following conditions are met:

Every Message	⇕	⊖ ⊕

Perform the following actions:

Apply Act-On Rule ⇕	Archive Support em: ⇕	Prior Messages ⇕	⊖ ⊕
Apply Act-On Rule ⇕	Archive Objective-J ⇕	Prior Messages ⇕	⊖ ⊕
Apply Act-On Rule ⇕	Archive ⇕	Prior Messages ⇕	⊖ ⊕

(Cancel) (OK)

Each of the Archive rules will affect only the message being replied to. Only the rules that have criteria which match the message will be applied.

Important Questions

In Mail Act-On 1, I had to have a "stop rule" in case Mail Act-On failed to load. Do I have to do the same with Mail Act-On 2?
No. Mail Act-On 2 now stores its rules separately from Mail's "inbox" rules. If you uninstall Mail Act-On or it doesn't load, your regular rules processes will not be affected.

Will Mail Act-On affect the stability of Mail?
We have worked hard to make sure the Mail-Act On is as stable as we can make it. If you are experiencing problems we would love to hear about it. You can tell us on our forums (http://www.indev.ca/forum) or send us an email: support@indev.ca

I have other questions. Who do I ask?
You can ask them on our forums (http://www.indev.ca/forum) or send us an email: support@indev.ca