




TOP 15

ZIMBRA TIPS & TRICKS

This guide brings you the top 15 Zimbra Tips & Tricks to help you save time while working in Zimbra.

If you find these Tips & Tricks helpful, you may also like our tutorial demos: 

The top 15 Zimbra Tips & Tricks (based on clicks on Zimbra's "Did You Know?" blog) are:

Throughout this guide, look for pop-up boxes highlighting quick tips and facts.

TIP: Skip ahead to any section of the 15 Tips & Tricks by clicking on the titles to the right.

Email Tips and Tricks

- 1 Searching in Zimbra
- 2 Importing Into and Exporting From Zimbra
- 3 Changing Your Zimbra Preferences
- 4 Changing Your Zimbra Theme
- 5 Setting Zimbra Email and SMS (text) Reminders
- 6 Enabling Zimbra's Mandatory Spellcheck
- 7 Sorting Email
- 8 Creating an Appointment with the Mini Calendar
- 9 Creating an Email Distribution List or Contact Group
- 10 Opening an Email in a Separate Window
- 11 Turning on Zimbra's Activity Stream
- 12 Switching from Conversation View to Message View
- 13 Sharing Your Zimbra Calendar Outside Your Organization
- 14 Sharing in Zimbra
- 15 Enabling Zimbra Two-Factor Authentication



1 Searching in Zimbra

There are many great and easy ways to search in Zimbra:

- Quick keyword search
- Complex search
- Right-click search

Quick Keyword Search

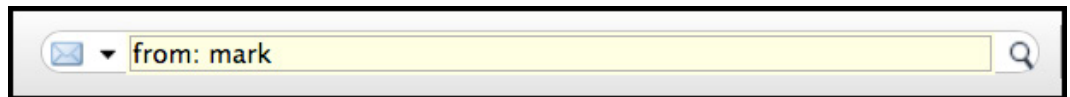
You can do a quick search using keywords like from, to, in, etc. Click [here](#) to see all search keywords.

To search by keyword:

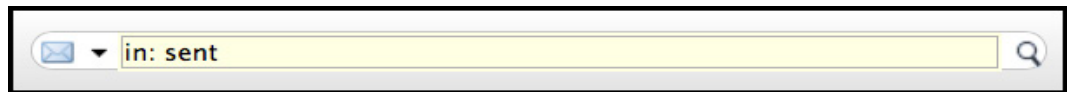
keyword: search word(s)

Examples:

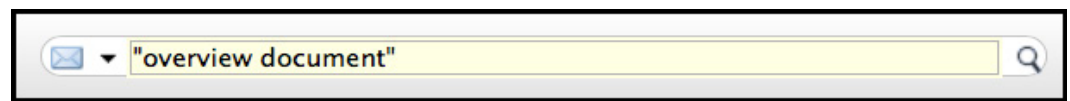
- Find all email received from Mark (all email with “Mark” in the From field):



- Find all email in the Sent folder:



Search for words in an email by typing the words into the search field. For example, to search for email including “overview document”:



This shows all email with “overview document” in the:

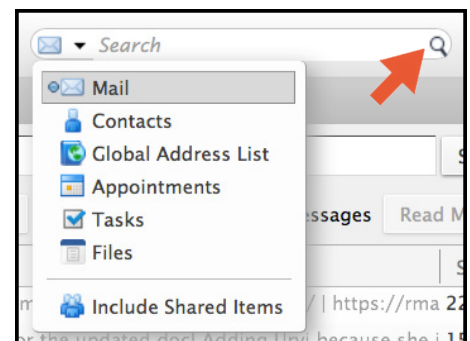
- Content
- Subject line
- Attachments
- Etc.

Use quotes to search for multiple words combined. Without the quotes, the search results will include all emails with “overview” and all emails with “document”.

Complex Searches

You can also build a complex search using the Search menu.

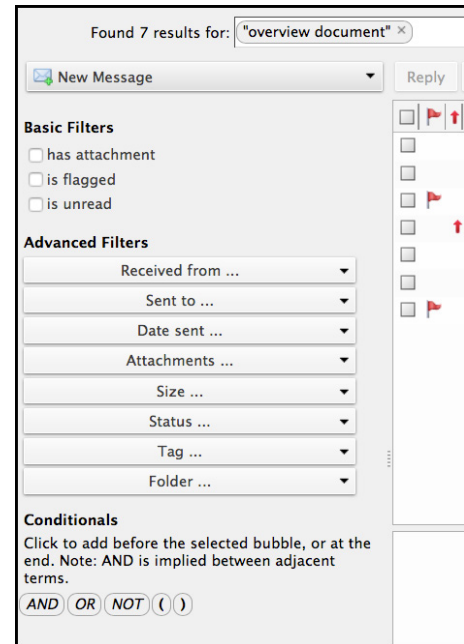
Click the magnifying glass in the search field to open the Search tab.



How much time do you spend searching for a specific email? Searches are easy and fast in Zimbra. Search your entire Zimbra account, including attachments, in seconds.

The Search tab has multiple menus and options that you can use to refine a search. For example, you can:

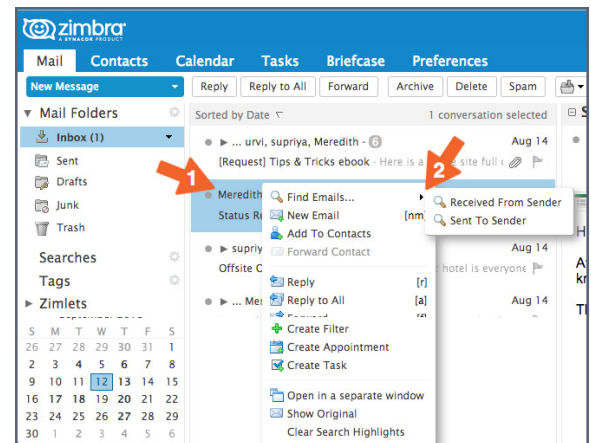
- Click “has attachment” to see only emails that include attachments
- Set a date range
- Show email only from or to a specific sender
- Show only email with a specific tag
- Etc.



Right-Click Search

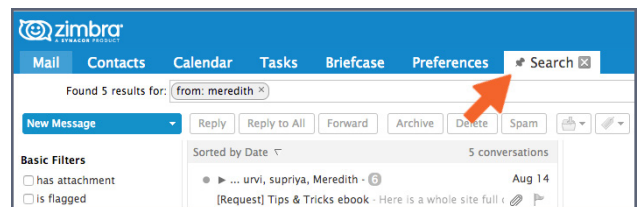
There is a quick way to search for all email you have sent to or received from a specific user:

1. Right-click a user name (in your inbox, in an email, in an appointment, etc.).
2. Click Find Email.



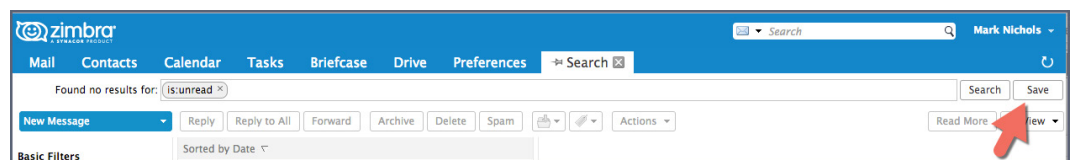
Pin Your Search Tab

Pin the Search tab to alternate between the search results and your mail ... the search results don't disappear!



Save Your Search

Save any search you perform often. To save a search, click the Save button.



This is a great feature of Zimbra's search ... your search results don't disappear! They open in a separate tab that you can refer to as needed.

Saved searches are in the overview pane.
Click the search whenever you need it.

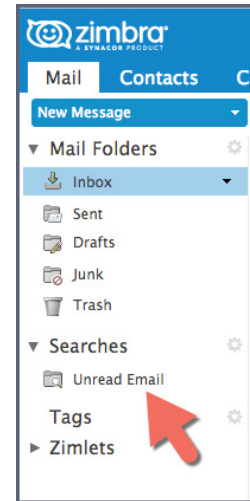
Do you want to learn more about searching in Zimbra?

Zimbra Blog posts:

- [Searching with Keywords](#)
- [Searching using the Search Menus](#)
- [Creating a Search](#)
- [Using Common Searches](#)
- [Save a Search](#)

Zimbra tutorial:

- [Searching in Zimbra](#) 



2 Importing Into and Exporting From Zimbra

You can easily move content into and out of your Zimbra account with the Import and Export features.

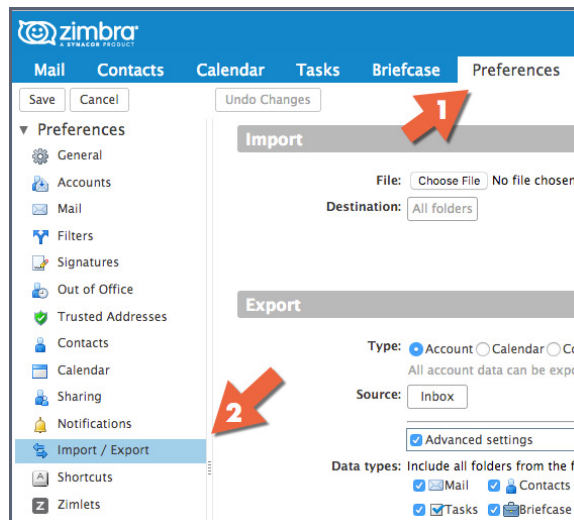
Things you can import and export include:

- Mail folders (in tar-gzipped .tgz format)
- Calendars (in iCalendar .ics format)
- Contacts (in .csv format)

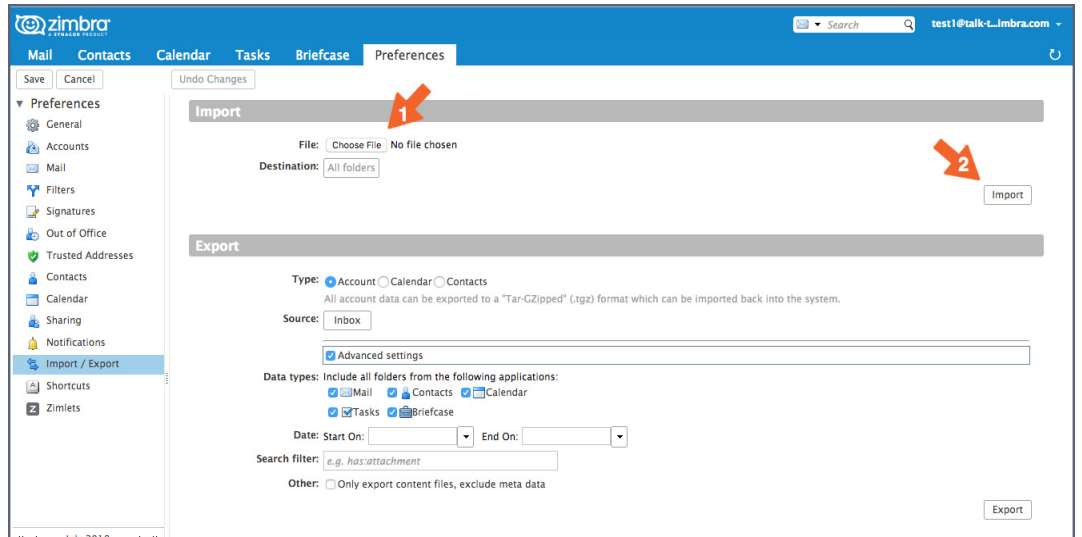
To import or export:

1. Click the Preferences tab.
2. Click Import/Export.

You can easily add files (like address book contacts) from another account (like Google) to Zimbra using Import. Likewise, if you want to move your Zimbra contacts into another account, you can export an address book from Zimbra.

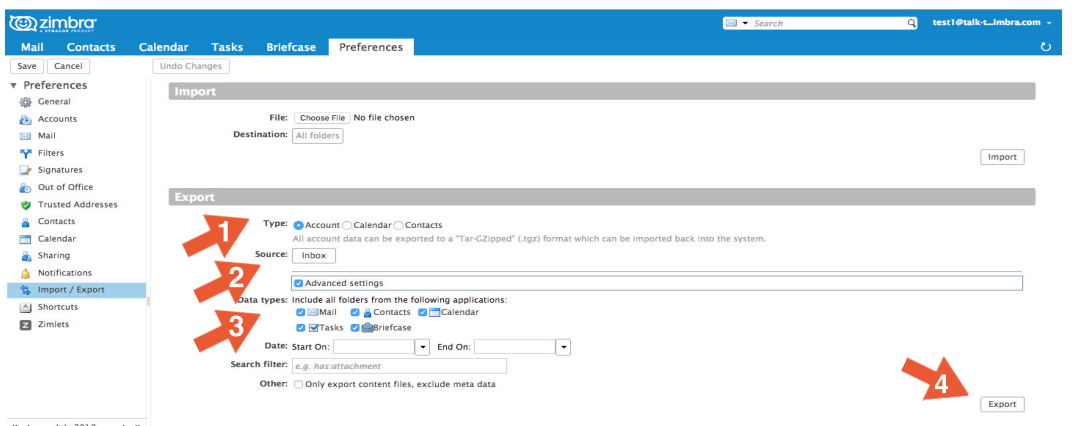


To import, choose a file and click Import. Zimbra automatically detects the type of file being imported and displays appropriate import options




To export:

1. Select the type of item: Account (mail folder), Calendar or Contacts.
2. Select the item from the Source menu.
3. Click “Advanced settings” to specify:
 - What data types are included in the export
 - What date range to export
 - What filters to use, if any
4. Click Export.



View a demonstration: 

3 Changing Your Zimbra Preferences

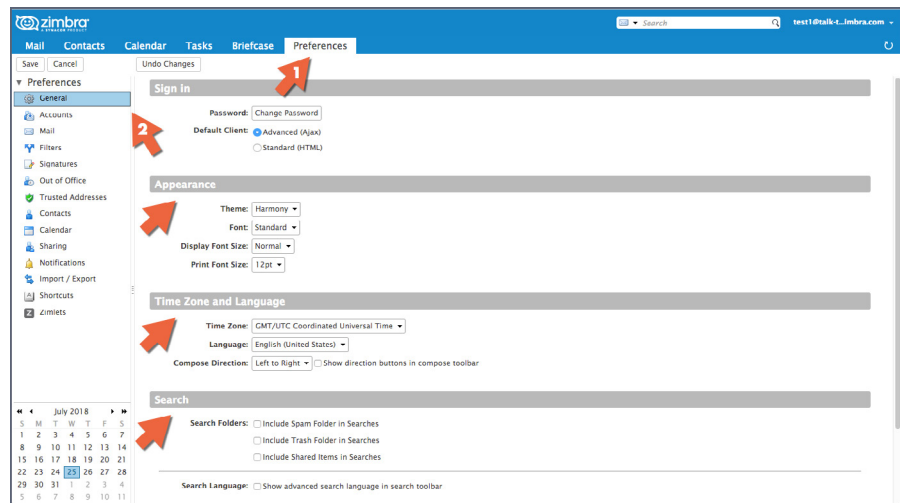
In Zimbra, you can change many preferences to fit your work style and needs. Here are some Preferences highlights. For more information, view a demonstration: 

To change your preferences:

1. Click the Preferences tab. Your Preferences are listed in the overview panel.
2. Click General. On the General page, you can change:
 - Appearance, such as the theme (colors of your Zimbra interface), font, etc.
 - Time zone and language displayed
 - Search folders included in your searches

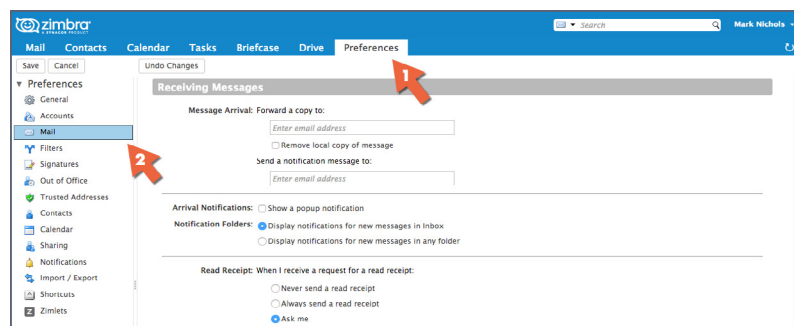
Have you ever wanted to customize your email or calendar? For example, maybe you want to:

- Read emails below the inbox instead of on the right?
- Display your calendar in a month view instead of a work week view?
- Change the language of your display or your timezone?




On the Mail page are options to customize how Zimbra displays messages and how Zimbra responds to received messages, such as:

- Specify an action to occur when you receive a message (flash the browser title, show a pop up notification, etc.)
- Forward a copy of the message to another address (helpful if someone else manages your calendar invitations and/or inbox)
- Send a notification message to another address (helpful if you do not check your Zimbra mailbox often)



Other Preferences pages include:

- Accounts: Link your other email accounts to Zimbra, so you can see all of your email in your Zimbra Inbox
- Filters: Set up mail rules or filters
- Out of Office: Set up your vacation or out of office messages
- Signatures: Create as many signatures as you need
- Calendar: Specify your own calendar settings, such as view, working hours, etc.
- Sharing: Create and manage your shared Zimbra items
- Shortcuts: View or print the keyboard shortcuts available in Zimbra

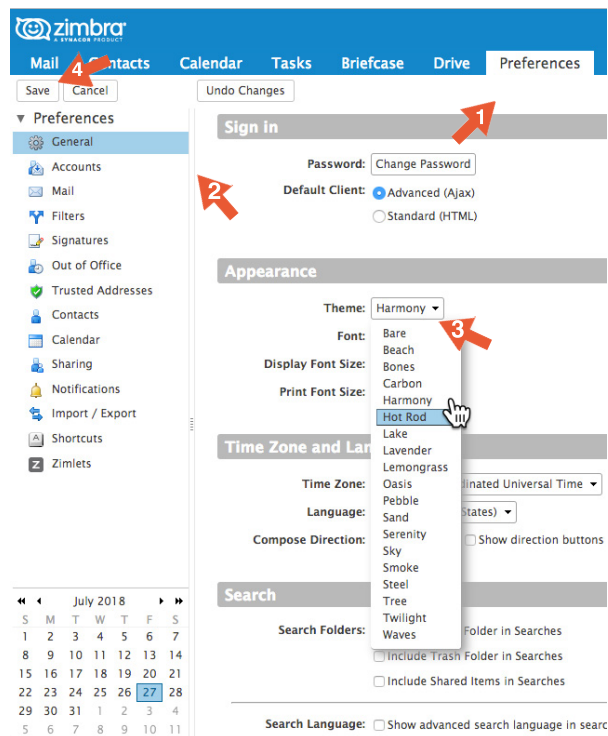
View a demonstration: 

4 Changing Your Zimbra Theme

To change your theme:

1. Click the Preferences tab.
2. Click General.
3. Select an option from the Theme menu.
4. Click Save.

There is another great customization you can make in Zimbra – the theme. Your Zimbra web client probably shows the colors and logos of your company or email service provider. You can change the colors by changing your Zimbra “theme” in Preferences.

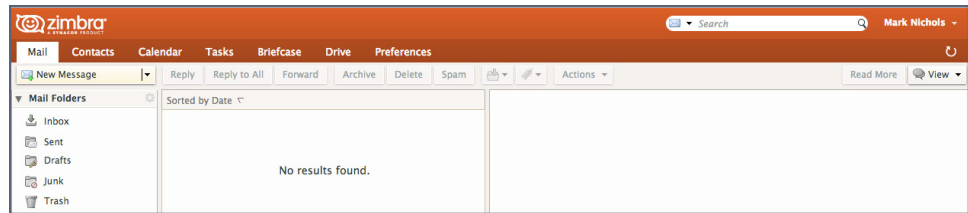


Note: If you do not have a Theme menu, or if you do not have the Theme options displayed here, your organization has not enabled them. Please contact your System Administrator or email service provider for more information.

You are prompted to reload Zimbra.

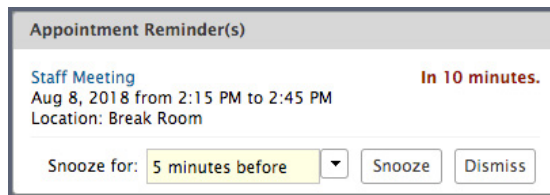


The new theme is displayed.



5 Setting Zimbra Email and SMS (text) Reminders

When you create an appointment in Zimbra, you can specify a pop up reminder. This is a window that pops up in your browser like this:

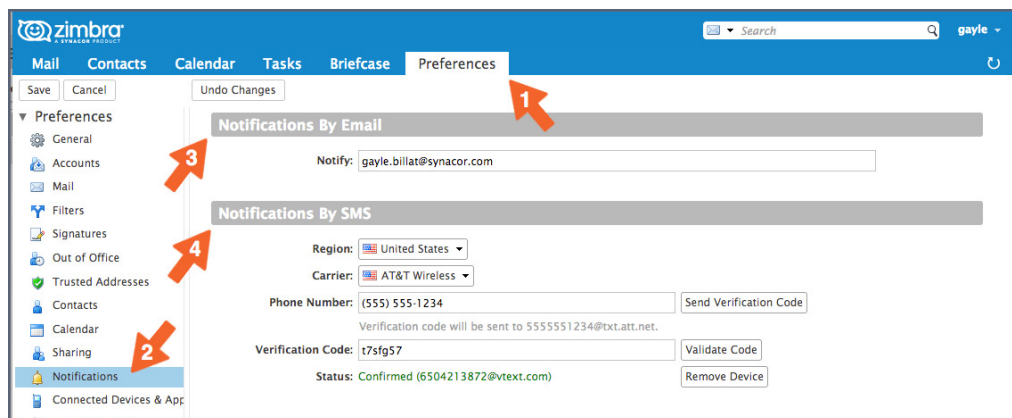


Have you ever forgotten an appointment and wished you had a reminder in email or on your phone? With Zimbra, you can!

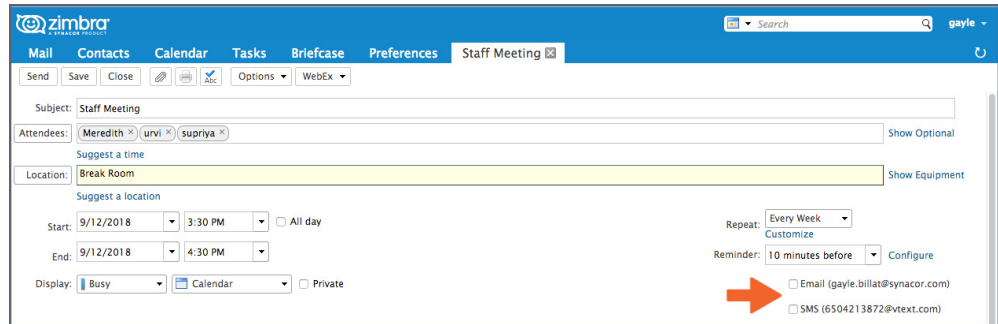
You can set up email and/or SMS (text) reminders in Zimbra Preferences.

To set up email and/or text reminders:

1. Click the Preferences tab.
2. Click Notifications.
3. Complete the fields.
4. Save your changes.




Note: If you do not have a Notifications option, your organization has not enabled this Zimbra feature. Please contact your System Administrator or email service provider for more information.



When you next create a calendar appointment or task, you will see new options in the Reminder area, as shown below.

- Click the Email box to send a reminder to your email address.
- Click the SMS box to send a text reminder to your phone.

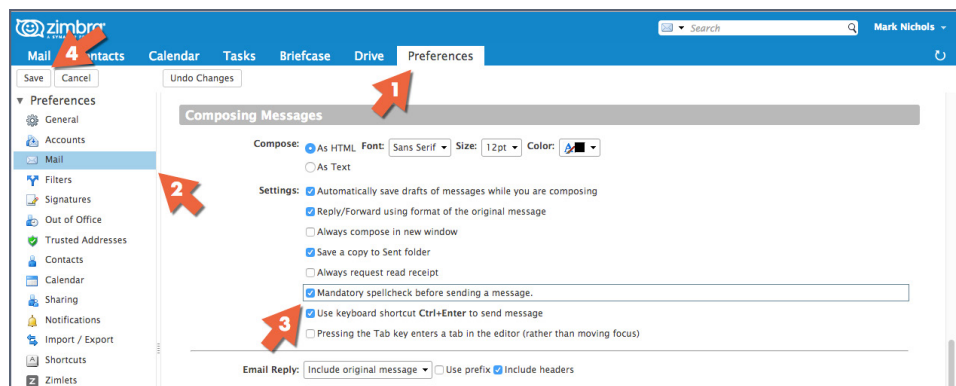
View a demonstration: 

6 Enabling Zimbra's Mandatory Spellcheck

To set up mandatory spellcheck:

1. Click the Preferences tab.
2. Click Mail.
3. Scroll down to the Composing Messages area, and select Mandatory spellcheck before sending a message, as shown below.
4. Click Save.

Have you ever sent an email with embarrassing spelling errors? In Zimbra, you can enable mandatory spellcheck to automatically spellcheck every email before it is sent.



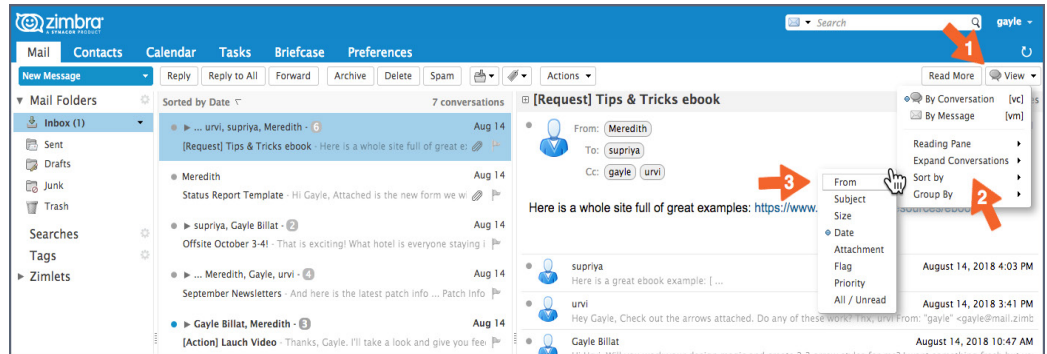
7 Sorting Email

When your reading pane is on the right:

1. Open the View menu.
2. Open the Sort by menu.
3. Select the category for sorting.

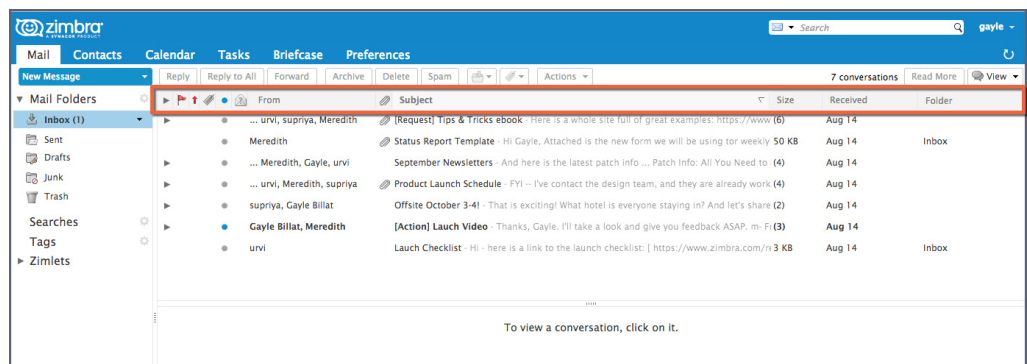
When you open Zimbra, your email is listed chronologically by date received. Have you ever wanted to change that sorting order? Maybe you want to see email listed:

- By sender
- With flagged messages on top
- In reverse chronological order
- By size



When your reading pane is on the bottom, click any column header to sort by that category. For example, click the:

- Subject column header to sort alphabetically by Subject
- Flag column header to display all flagged messages first
- From column header to sort all messages alphabetically by sender. Click again to sort them in reverse alphabetical order.
- Received column header to sort all messages chronologically by date received. Click again to sort them in reverse chronological order.

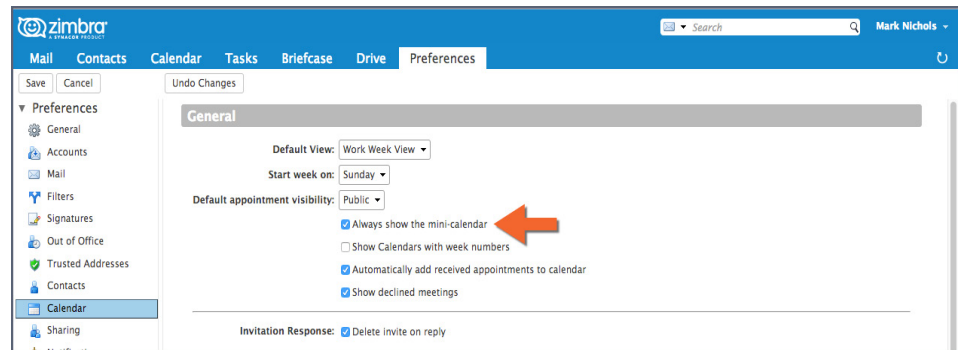


View a demonstration: 

8 Creating an Appointment with the Mini Calendar

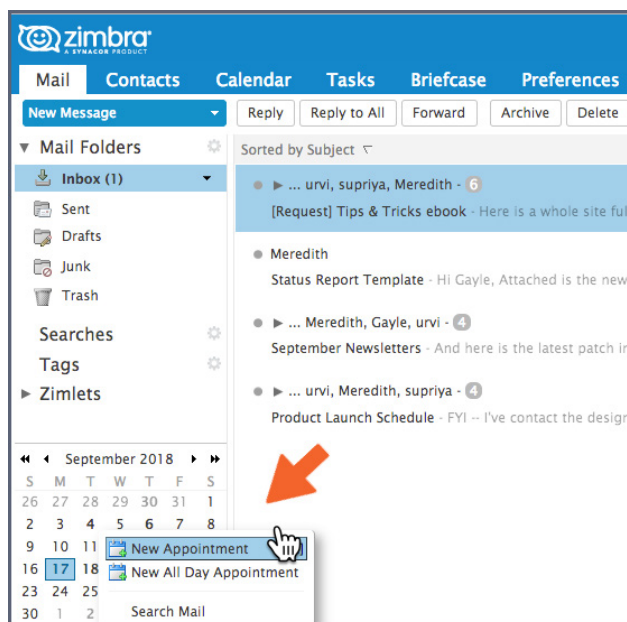
Note: If you don't see a mini calendar, either your organization has not enabled the mini calendar or that preference is turned off in Preferences > Calendar > Always show the mini calendar. Please check your Preferences and, if needed, contact your System Administrator or email service provider for more information.

Do you use your Zimbra mini calendar? It can save you a lot of time when you create appointments!



There are two ways to use the Zimbra mini calendar as a shortcut to create a meeting:

1. From an email: This is an excellent shortcut because it opens an appointment tab that automatically includes everyone in the email to/from/cc lists, the content of the email and any attachments from the email! View a demonstration: [▶](#)
2. From any Zimbra tab: As shown below, right-click any date on the mini calendar and select New Appointment. You do not need to be in the Zimbra Calendar tab to create a new appointment.

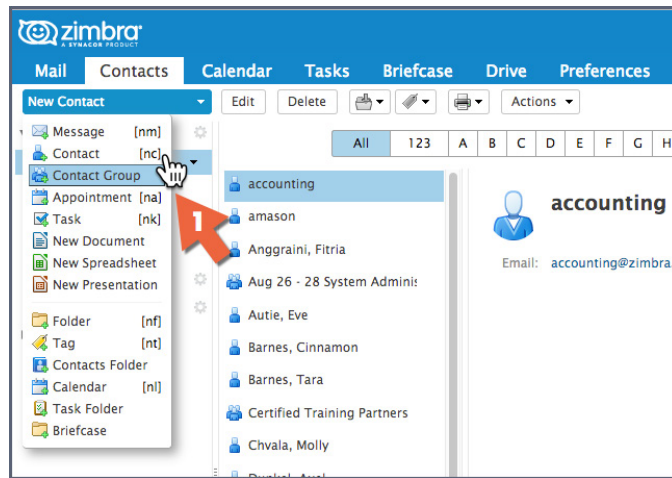


9 Creating an Email Distribution List or Contact Group

You can create as many contact groups as you need. You might have a contact group for your work team, your larger department, friends, family, etc. As you type an address into Zimbra, your contact groups autocomplete, too, adding all of the addresses in the group automatically.

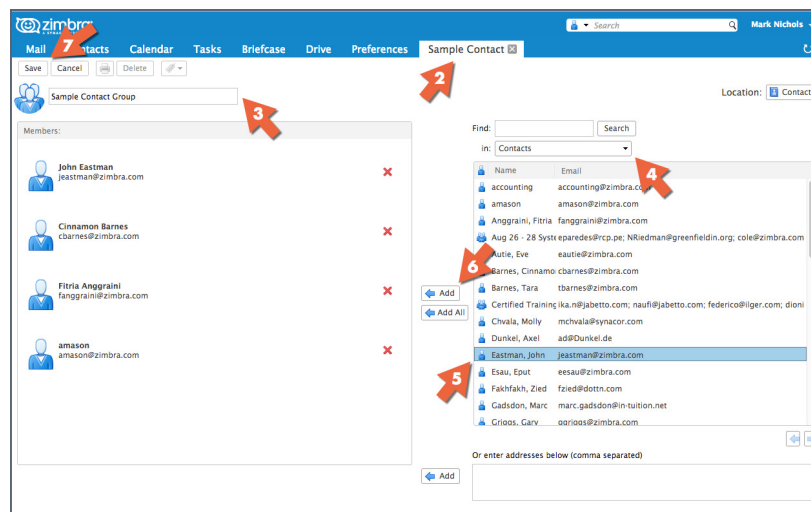
To create the contact group:

1. Open the New menu on any tab and select Contact Group.



Zimbra's autocomplete feature is great when you are addressing emails or creating appointments – as you type, addresses pop up for you. But it is also very useful to have your own email sending list, which is sometimes called a distribution list. In Zimbra, this is called a contact group.

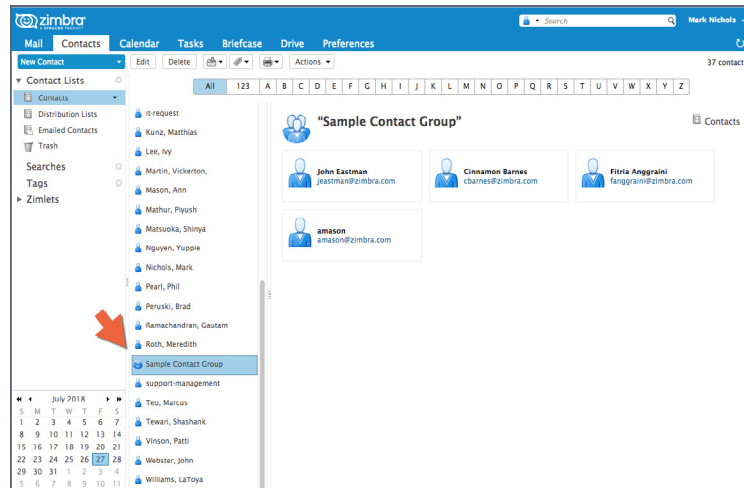
2. The Contact Group tab opens.
3. Name the group.
4. Search for contacts to add to the group. Zimbra searches for addresses in the Global Address List, but you can change this to search your Contacts.
5. Select contacts.
6. Click Add to add a contact.
7. Click Save to save the group.




Note: Global Address List is a technical name for your company directory.

The new contact group is displayed. Notice that the icon for a contact group is a multiple head-and-shoulders icon.

When entering an address in an email or appointment, just type the name of the contact group, and all addresses from the group will auto-complete for you.



View a demonstration: 

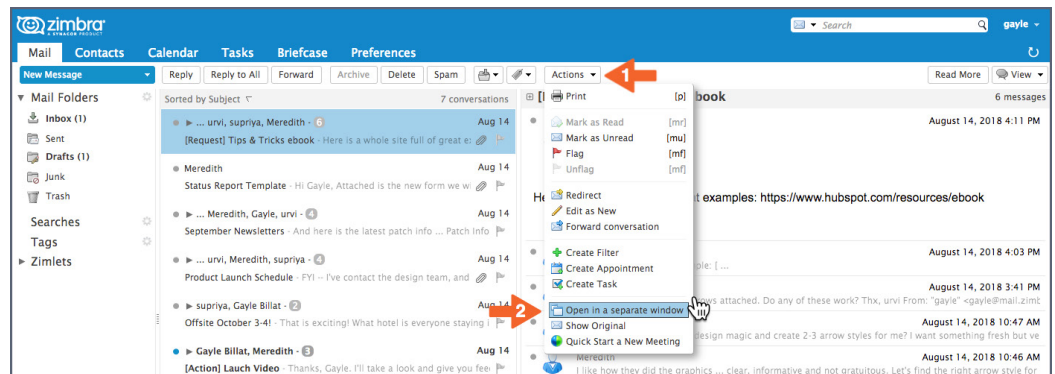
10 Opening an Email in a Separate Window

You can open an email in a separate window when:

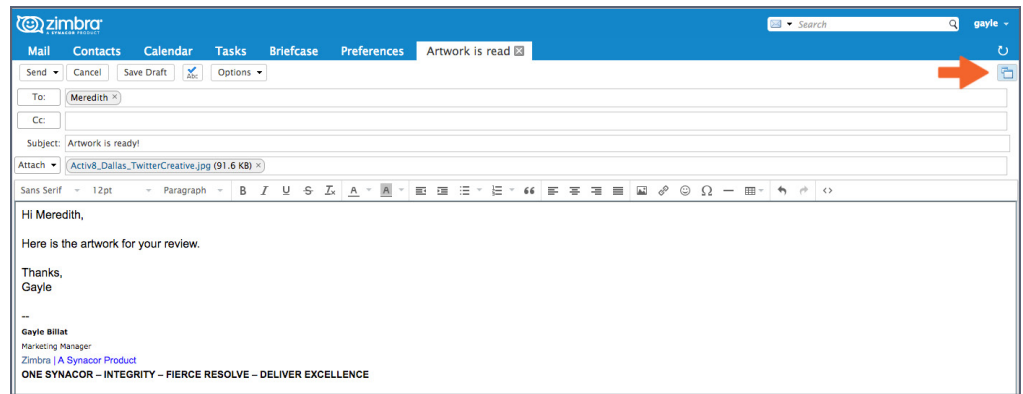
Reading email:

1. Open the Actions menu.
2. Select "Open in a separate window".

Have you ever been frustrated by having to click back and forth to different tabs to copy and paste from one email to another? In Zimbra, you can open emails in separate windows!



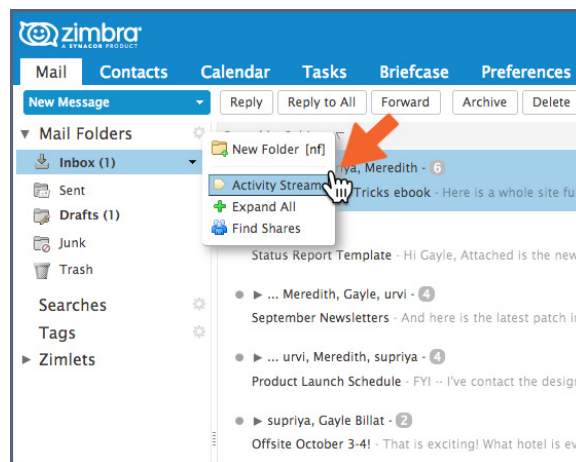
Composing email: Click the icon in the top right corner of the compose tab.



11 Turning on Zimbra's Activity Stream

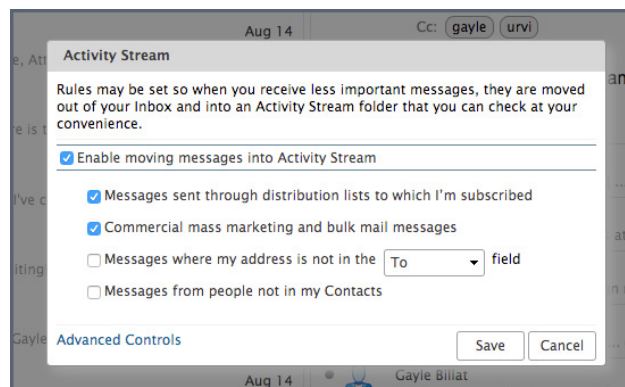
To turn on the activity stream:

1. Click the gear icon in the Folders area of the navigation pane, and select Activity Stream.

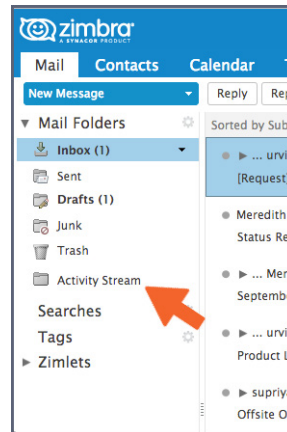


Do you get frustrated when your inbox is cluttered with email like newsletters, updates from social sites, etc? In Zimbra, you can easily filter these emails into the Activity Stream folder instead of your inbox.

2. Select Enable moving messages into Activity Stream.
3. Select the type of messages to move:
 - Messages where your address is not in the To or in the To or Cc field
 - Messages from people not in your address book
 - Messages sent to a distribution list that you are a member of
 - Commercial mass marketing and bulk mail messages
4. Click Save.



The Activity Stream folder is now in the folders list, and all email meeting the filter criteria will be delivered into this folder instead of your inbox.

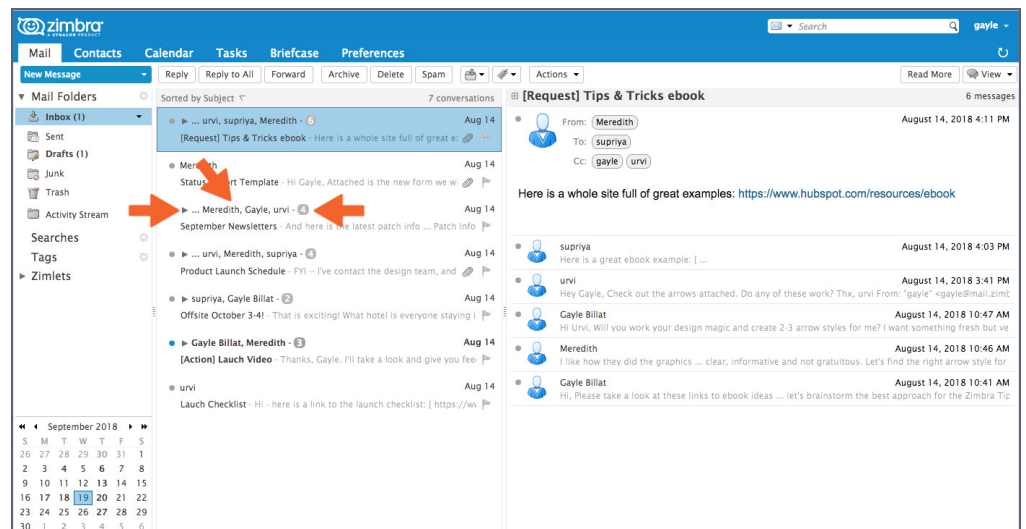


12 Switching from Conversation View to Message View

A quick summary of conversation view:

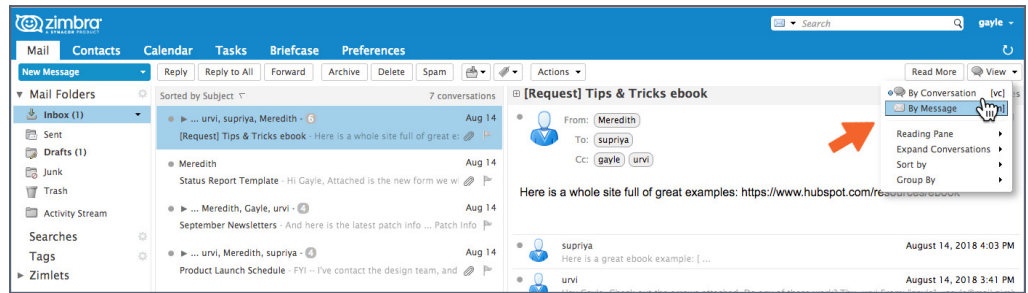
- All email with the same subject is grouped into a conversation.
- You can easily see when you are in conversation view from:
 - The expand/collapse arrows
 - The number indicating how many messages are in the conversation
 - Multiple names in the From column

Zimbra automatically shows all of your emails in conversation view. Do you know what conversation view is? Do you know how to change your view?

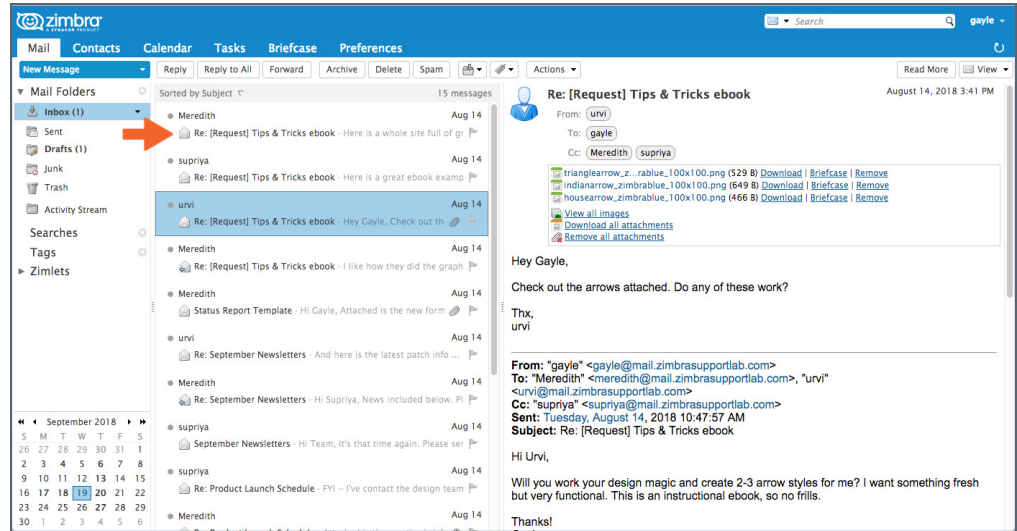


You can easily switch from conversation to message view. Message view is a more traditional display where every email is shown in a separate row.

To switch from conversation view to message view, select View > By Message.



You can easily see when you are in message view by the mail icons.

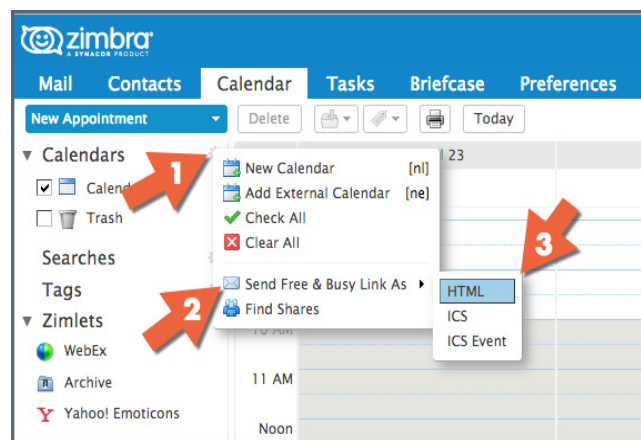


13 Sharing Your Zimbra Calendar Outside Your Organization

You can share your Zimbra Calendar information with anyone via a link. They can click the link to see when you are free or busy.

To share your calendar via a link:

1. Click the gear icon in the Calendars navigation pane.
2. Select the Send Free & Busy Link As option.
3. Select the link format. In this example, I will send an HTML link.



Have you ever wanted to share your Zimbra calendar with someone outside of your organization? Perhaps family or friends who want to see your work schedule. Or perhaps you want to share the calendar with people who frequently schedule appointments with you.

A compose window opens with the link. Send this link, and when the user clicks the HTML link, this is displayed:

July 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7/1 • 11:00 AM - 11:30 AM Busy • 12:00 PM - 1:30 PM Busy • 5:30 PM - 6:00 PM Busy	2 • 6:00 AM - 7:30 AM Tentative • 6:00 PM - 8:00 PM Busy	3 • 12:00 AM - 12:00 AM Busy	4 • 6:00 AM - 7:00 AM Busy • 10:00 AM - 10:30 AM Tentative	5 • 8:25 AM - 10:10 AM Busy	6	7
8 • 5:30 AM - 6:30 AM Tentative • 12:00 PM - 1:00 PM Busy	9 • 6:00 AM - 7:30 AM Tentative • 7:45 AM - 8:15 AM Busy • 9:00 AM - 9:30 AM Busy • 9:30 AM - 10:00 AM Tentative • 1:00 PM - 2:00 PM Busy	10 • 6:00 AM - 7:30 AM Tentative • 7:45 AM - 8:15 AM Busy • 9:00 AM - 9:30 AM Busy • 9:30 AM - 10:00 AM Tentative • 1:00 PM - 2:00 PM Busy	11 • 7:00 AM - 8:30 AM Busy • 9:30 AM - 10:00 AM Busy • 10:45 AM - 11:45 AM Busy • 12:30 PM - 1:30 PM Busy	12 • 7:00 AM - 8:00 AM Busy • 10:30 AM - 12:30 PM Busy • 1:50 PM - 2:50 PM Busy	13	14
15 • 12:00 PM - 1:00 PM Busy • 5:00 PM - 6:00 PM Busy	16 • 6:00 AM - 7:30 AM Tentative • 5:30 PM - 12:00 AM Busy	17 • 12:00 AM - 2:30 AM Busy • 5:30 PM - 9:00 PM Busy	18 • 5:00 AM - 6:00 AM Busy • 10:00 AM - 10:30 AM Tentative	19 • 6:30 AM - 7:00 AM Busy • 7:30 AM - 8:00 AM Busy	20	21
22 • 11:00 AM - 11:30 AM Busy • 12:00 PM - 1:00 PM Busy	23 • 6:00 AM - 7:00 AM Tentative • 7:00 AM - 7:30 AM Busy • 10:20 AM - 11:20 AM Busy	24	25	26	27	28
29 • 12:00 PM - 1:00 PM Busy	30 • 6:00 AM - 7:30 AM Tentative • 1:30 PM - 2:30 PM Busy	31	8/1	2 • 5:00 AM - 7:00 AM Busy • 10:00 AM - 10:30 AM Tentative	3	4
5	6 • 6:00 AM - 7:30 AM Tentative	7	8 • 7:00 AM - 8:00 AM Busy • 10:00 AM - 10:30 AM Tentative	9	10	11

14 Sharing in Zimbra

Why is this helpful? Here are some examples.

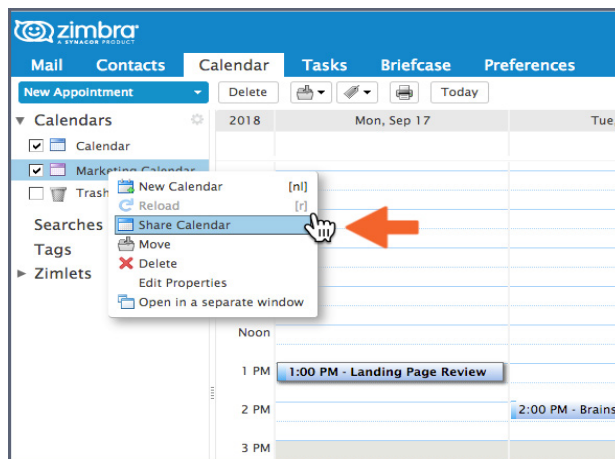
- If you are collaborating on documents with others, you can all work on the same documents from a shared briefcase folder.
- If someone else administers your calendar for you, you can share the calendar with him or her.
- If you have a working team that needs access to a set of emails, you can share the mail folder, and everyone included in the share can read the emails, respond to them, etc.

There are two ways to create shares in Zimbra:

- Right-click the item you want to share, and select Share Folder.

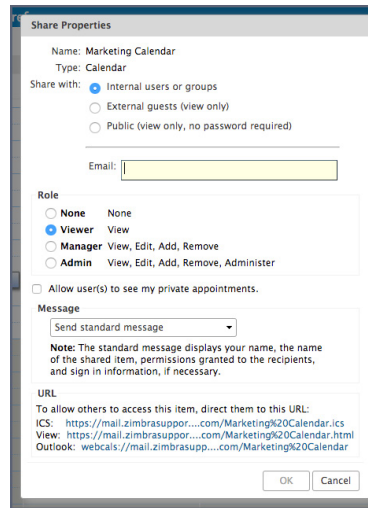
Did you know that you can share any of your Zimbra items? You can share:

- Email folders
- Address books
- Calendars
- Task lists
- Briefcase folders



- Click the Preferences tab, and click Sharing.

Using either method, you will see the Share Properties dialog box.

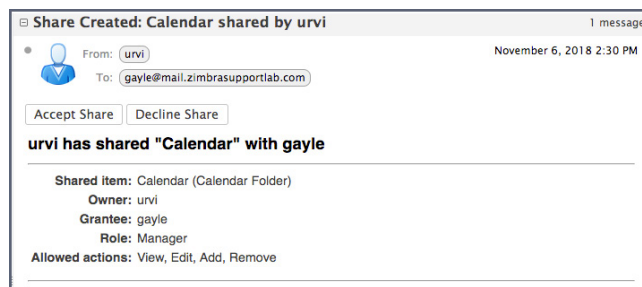


To create the share:

1. Select a “Share with” option:
 - “Internal users or groups” are those within your organization.
 - “External guests” are those outside your organization, and they must have a password to access the shared item.
 - “Public” is also for those outside your organization; however, they do not need a password.
2. Enter the email address(es) for the share.
3. Select the role:
 - None is not commonly used.
 - Viewer is view-only access.
 - Manager allows the user to view, edit, add, and remove from the shared item.
 - Admin allows the user to do all of the above and add/remove/change shares to the shared item.
4. Click OK.

The recipient receives an email as shown here. Ann can click either Accept Share, and she will be prompted to name the folder and choose a color, or Decline Share.

The email also contains a description of the share.



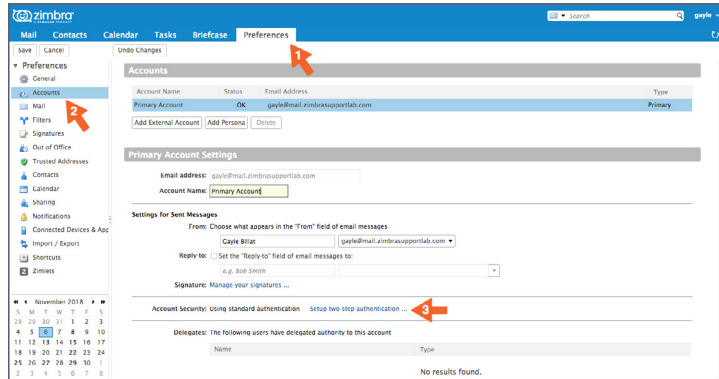
View a demonstration: 

15 Enabling Zimbra Two-Factor Authentication

Has your email account ever been hacked? Have your contacts received email "from" you that you didn't send? In Zimbra, you can set-up two-factor authentication (2FA), an extra layer of security for your Zimbra account. With 2FA enabled, to log into your Zimbra account, you need your password and a code generator on your smartphone.

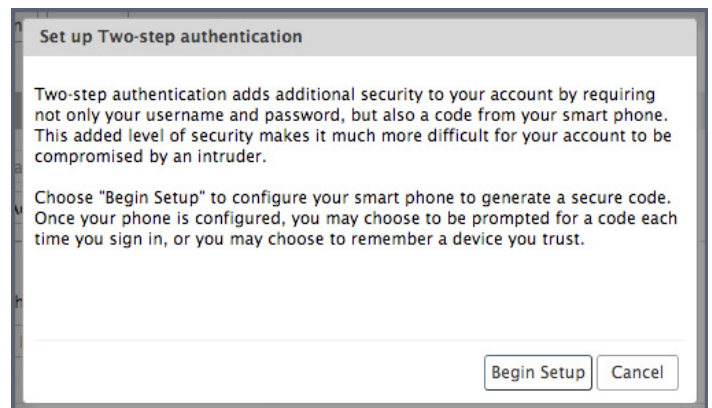
Enabling 2FA is easy, but there are a few steps. You will need access to both your Zimbra account and your smartphone to complete the 2FA setup.

1. Click the Preferences tab.
2. Click Accounts.
3. Click Setup two-step authentication

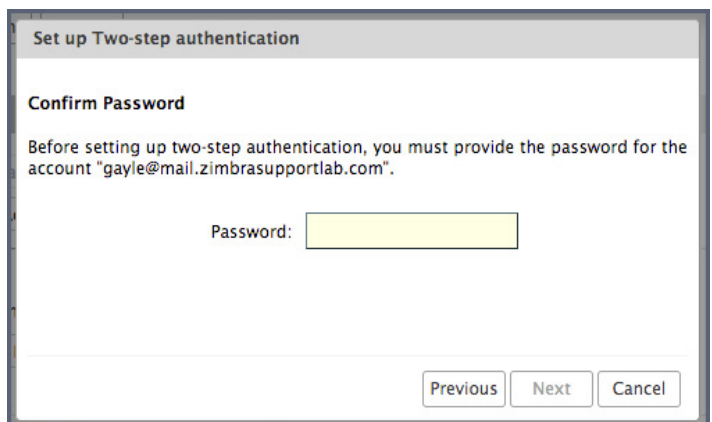


Note: If you do not see this option in your Account Preferences, your organization has not enabled the two-factor authentication feature. Please contact your System Administrator or email service provider for more information.

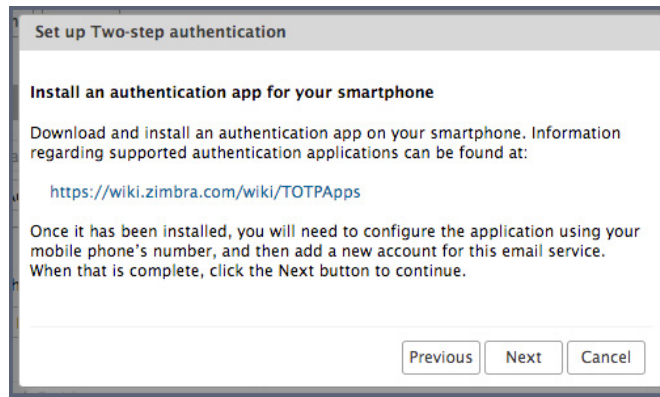
4. Click Begin Setup.



5. Enter your Zimbra password.



6. Click Next.



The next steps require your smartphone.

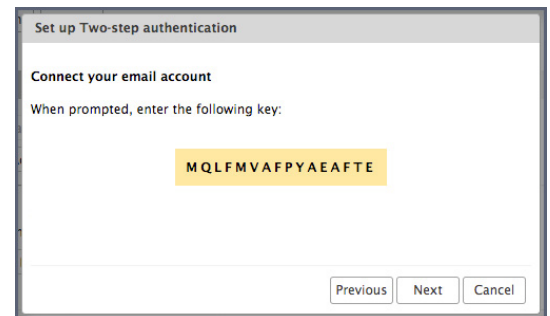
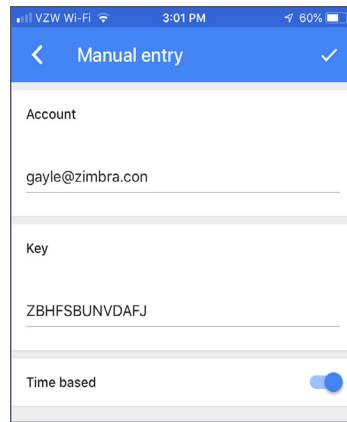
7. Click the URL to see which authentication applications are available for your smartphone.

- Download the authentication application and install it on your smartphone.
- Click Set up account in the application.
- Follow the steps to set up the account using a key.

8. Click Next.

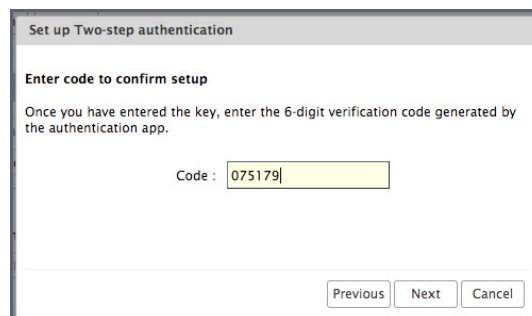
9. Using the app on your smartphone, enter your email address and the key provided in Zimbra, as shown.

10. Click Next.



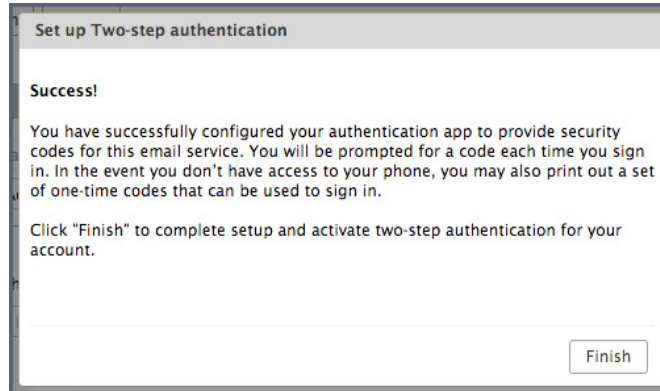
Your smartphone will provide a code to complete the 2FA setup.

11. Enter the code provided on your smartphone.

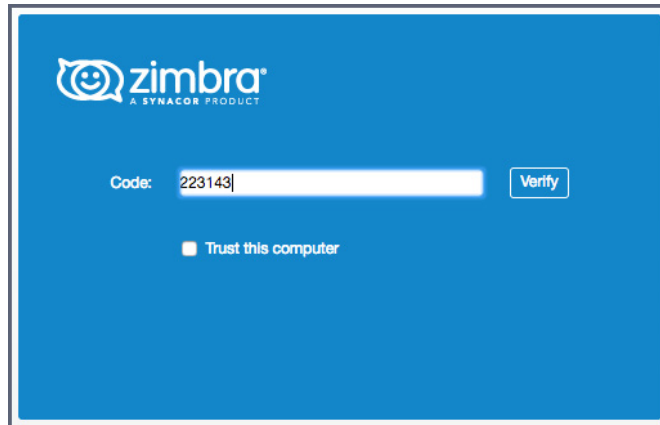


12. Click Next.

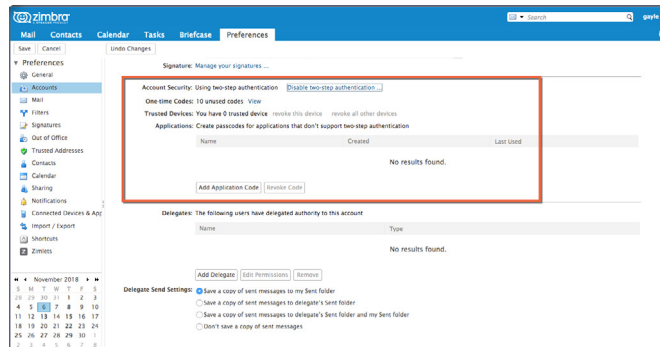
13. Success! You have enabled 2FA for your Zimbra account!




What now? Every time you log into your Zimbra account, you will be prompted for a new code from the application on your phone.



What if you don't have your phone, or what if your phone runs out of batteries? You have 10 one-time codes to use if you do not have your phone available. Simply click the "View" link and print the 10 codes (or copy them to an app on your phone). Keep these codes handy, so they are available when you need them.



View a demonstration: 



www.zimbra.com

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