



# User Guide

Caelo Software B.V.  
[www.emailorganizer.com](http://www.emailorganizer.com)

This guide applies to  
**NEO Find**

That's the magic of NEO -  
NEO uses new  
technologies to clear the  
email bottleneck without  
hindering all that Outlook  
already does.

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# Overview

## What is NEO Email Finder

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### Stop Searching, Start Finding Your Emails

Happy with Outlook but struggling to find your older emails back?

Stop searching and start finding your emails with NEO Email Finder. As a companion product of Outlook NEO Find runs unnoticed in the background keeping track of every move as email arrives, goes out and is stored away in your filing system.

NEO FIND organizes all emails automatically in the most logical and intuitive way people think about their messages: around the correspondent involved in the email communication. Just enter (part of) the name of the Correspondent and all emails are available, both sent and received.

Advanced filtering combined with a lightning fast search facility will bring up every email within seconds to your attention – independent where they are located in your entire Outlook system or how complex your filing system may be.

### Finding messages is a breeze

Your messages automatically appear exactly where you would expect them: at the Correspondent who was involved in the conversation. That makes finding them completely intuitive: no more need to search your emails as they are right where they should be. And when you do need to add a little search, our patented search technology is lightning fast.

### The only tool NOT searching for your emails

NEO Find: The only tool available which is not searching for your emails, but is automatically organizing them so you can find your emails where you expect them to be

### Companion product for Microsoft Outlook

NEO Email Finder is a companion product for Microsoft Outlook 97, 98, 2000, 2002(XP), 2003 and 2007. It works with Exchange, POP3 and IMAP message stores linked to Outlook.

## How NEO Works with Microsoft Outlook

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NEO is an add-on product to Microsoft Outlook and works with Outlook 97, 98, 2000, 2002, 2003, 2007 and Exchange Servers 5.5, 2000, 2003 and 2007.

### A single Catalog for all your Outlook message stores

Within Outlook you will normally want to keep multiple message stores: your mailbox for arriving messages, your filing system and probable one or more archive message stores.

NEO Find will create a single Catalog, holding references to all your emails throughout the entire Outlook system.

Your email messages are only indexed and not duplicated in NEO – the messages remain stored in your Outlook or Exchange Server message stores.

Like Outlook, NEO interfaces with your underlying message stores. When messages arrive into your message store, NEO is notified. When you send or delete messages, your NEO Catalog is updated in exactly the same way.

### **Indexing and the Catalog**

NEO works by creating indexes to your messages and storing the indexes in a separate NEO catalog. Whenever messages are sent, received or updated in the message store, NEO automatically updates the indexes in the catalog.

In NEO Find you can add all your message stores to become completely independent of the exact storage location within Outlook.

## **How NEO works with Exchange Server**

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NEO Find works with Microsoft Exchange Server mailboxes.

Here are some notes about using NEO Find with Exchange Server:

### **NEO is a client-side product**

That means NEO installs and operates completely on your computer. There is nothing about NEO that gets installed on the server or that is related to Exchange Server. In fact, Exchange Server is completely unaware of NEO.

### **You can organize your Mailbox, your PSTs and IMAP message stores**

If you are using NEO Find you can include your mailbox and as many PSTs or IMAP message stores as you like in your catalog. NEO Find will give you a seamless view to all your messages. NEO Find makes it appear as though all your emails are in one single location.

### **Using your offline message store (OST)**

Using Offline mode or Cached Exchange Mode will not affect organization of your messages within NEO Find. You can work as you always have while NEO Find keeps perfect track of every move.



# Getting Started

## Ways to start NEO

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### It's best to start NEO Find when Outlook starts and keep it running

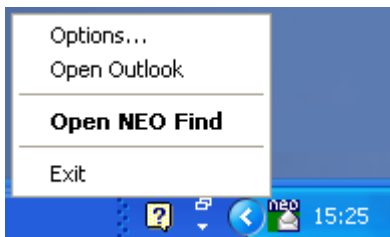
It is recommended to start NEO Find when starting Outlook. You can configure NEO Find to start when Outlook is started under Tools | Options | General tab. When you keep NEO Find running with Outlook, it keeps track of all message coming in/going out while running unnoticed in the background. When looking for a message you are always sure NEO Find is fully in sync with Outlook.

### NEO Find and the system tray

When minimizing NEO Find, it will hide in the system tray (the area where also the computer clock is located). Clicking the NEO Find icon will open and bring NEO Find to the foreground ready to find your messages.

You can configure NEO Find to minimize and hide in the system tray when starting setting this option in Tools | Options. This way NEO Find will never be in your way when started automatically by Outlook.

Right-clicking the NEO Find icon in the System Tray opens a small menu with following options:



- “Options” will open NEO Find with the Options menu open (from the Tools menu).
- “Open Outlook” will open Outlook, even when Outlook has not started in the foreground or when Outlook was already closed.
- “Open NEO Find” (default) opens NEO Find.
- “Exit” will close down NEO Find without first opening it in the foreground.

### Start NEO manually

After Outlook has started, you can also start NEO manually as you would any application:

- Click NEO Find from Start | Programs.
- Double-click the NEO Find icon on your desktop

You can also start NEO Find from Outlook: Click Go to NEO Find on the Tools menu in Outlook, or click the NEO Find icon on the Outlook toolbar.

## Closing NEO

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### Closing NEO Find automatically with Outlook

Closing Outlook through the File | Exit command will automatically close NEO Find as well. By customizing Outlook's toolbar the File | Exit command can be placed anywhere on the toolbar (e.g. to the right of the Help command). This will provide easy access and a single click to close both Outlook and NEO Find. For further details please refer to our Knowledge Base article [T1181](#).

Please keep in mind when closing Outlook's window (through the top right 'X'), Outlook's process is allowed to continue to run which will not force a close-down of NEO Find.

## Get help from within NEO

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Help is available from within NEO via:

**Tool tips** For a short description of toolbar commands and other command buttons, roll your mouse over the command. A tool tip will appear in about one second.

**Shortcuts** Available on the Help menu.

**Help system** Press F1; also available through "more info" and Help buttons inside NEO.

## Support and Feedback

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Click **Send Email to Support** on the Help menu.




# Finding Emails

## A short introduction to NEO Find

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NEO Find's main features.

### 1 View tabs

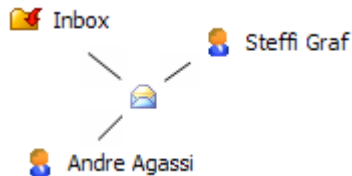
-  **Correspondent** All your emails are automatically organized into Correspondent folders for you.
-  **Search** Enter your search words and NEO automatically searches across all your folders.
-  **Outlook** You can view your Outlook folders just as in Outlook.

### 2 How NEO Find works

NEO Find organizes all your emails automatically using Virtual Folders.

**No need to search for your emails as you know exactly where they are!**

- Virtual Folders** NEO displays the same message automatically for every Correspondent involved in the correspondence:



# Finding Messages Quickly

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## Use the Correspondent to find all your messages



F5

Click the **Find Correspondent** button on the toolbar (F5). If looking for Fiona Mackay, enter **mac** in the Folder List filter to short-list your Correspondents for easy selection.



The **green** background color tells you that you have a Folder List filter active.

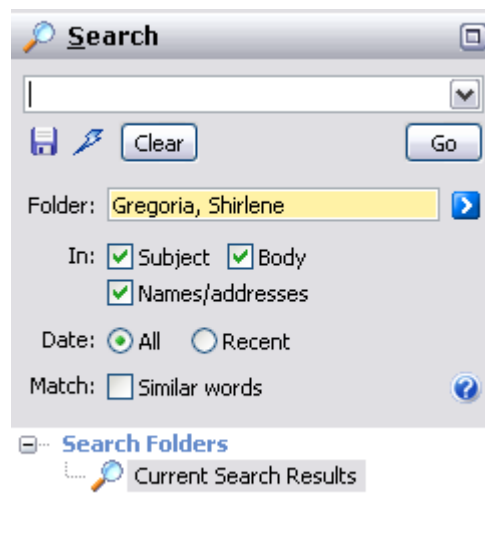
To **clear** the filter, click Clear or press the Esc key.

## Search within a Correspondent folder



F6

Highlight a Correspondent and click the **Search in (Correspondent) Folder** button (F6) to quickly search through the mails from a single correspondent.



## Search on Conversation



F7

Highlight a message (e.g., with Subject Product Ideas) then click the **Search on Conversation** button (F7) to find all messages in the same conversation.

| To            | Name           | Subject           |
|---------------|----------------|-------------------|
|               | Terry Johnston | RE: Product Ideas |
|               | Terry Johnston | RE: Product Ideas |
| To: John Niec |                | RE: Product Ideas |
| John Niec     |                | RE: Product Ideas |
| John Niec     |                | RE: Product Ideas |
| To: John Niec |                | RE: Product Ideas |
| John Niec     |                | Product Ideas     |

## Free Search



F8

Click the **New Search** button on the toolbar (F8) to do a full search through the entire Outlook system producing lightning fast results.

**Search**

car

Clear Go

Folder: All Folders

In:  Subject  Body  
 Names/addresses

Date:  All  Recent

Match:  Similar words

You can even enter logical phrases like **(car or bus) near accident**.

Or enter parameters to limit your search such as searching within a folder.

## Jump to containing folder(s)



Right-click any message and choose **Jump to Folder** (Ctrl+J) to display all messages for the person from the email, in this case, Terry Johnston.



# Options & Customizing

## Your Addresses

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### About Your Addresses

NEO needs to know which addresses are yours in order to automatically organize your messages. If not all your addresses are entered, your messages will not appear correctly.

Note that **NEO must know all your addresses** - not just your currently used ones. Be sure to include your old addresses if you have messages that used them.

### Auto-detecting your addresses on catalog creation

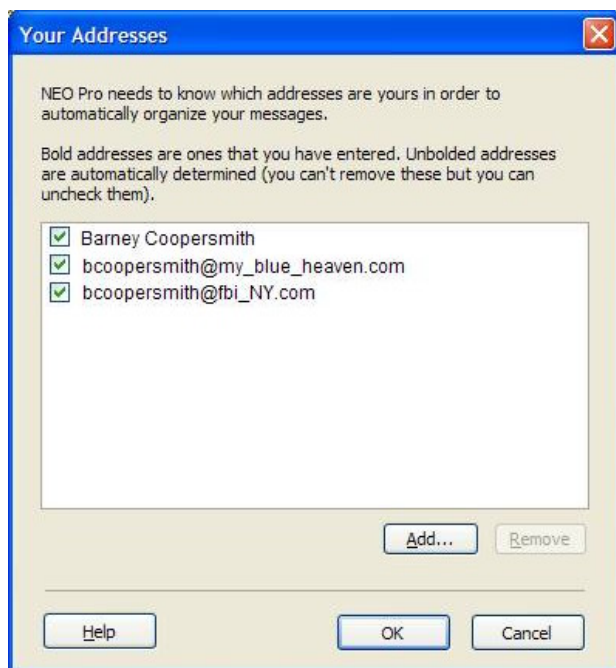
NEO automatically detects your addresses when you create a catalog, and you can add to the list NEO auto-detects. Addresses you enter are displayed in bold.

**Important Note:** NEO does not auto-detect addresses you use after creating the catalog. You have to enter these manually.

### Adding and removing addresses

You can add addresses and you can remove addresses you add. Addresses NEO auto-detects cannot be removed - however, you can choose not to include them by unchecking them).

Click File menu | Your Addresses to keep your addresses up to date.



To add an address, click the Add command. POP3 email addresses are entered in the usual way (e.g., bcoopersmith@fbi\_NY.com). Exchange Server addresses are entered in X.500 format.

## Options

### General Options

These options control NEO startup and other general settings.

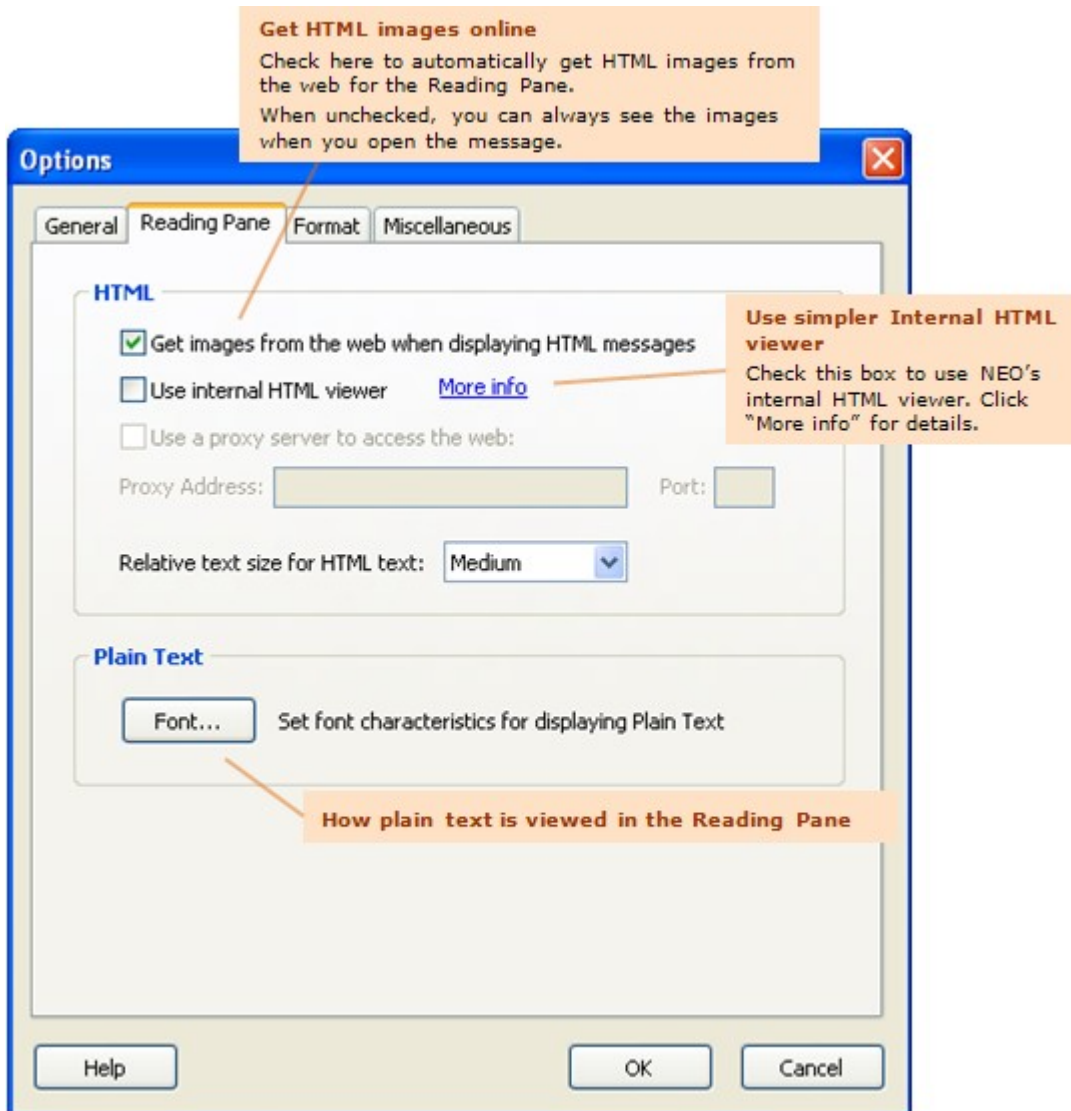
The screenshot shows the 'Options' dialog box with the 'General' tab selected. The dialog is divided into several sections: 'Startup', 'Your Addresses', 'Confirmation', and 'Search update'. Callouts provide detailed explanations for key settings:

- Fast Sync on startup:** When NEO starts, it "fast" synchronizes your messages. Now you are sure all your messages show in NEO.
- Start minimized in tray:** When starting NEO, it will immediately hide in the System Tray. When starting together with Outlook, it will never be in your way and yet be immediately available when needed.
- Your email addresses:** Be sure to add new email addresses when you get them.
- Confirmation:** Check to be warned before combining Correspondents.
- Update Word Index:** NEO indexes all words in your messages to quickly find them. This setting specifies how often to update the word index. You can always perform a manual update of the word index from the Tools menu. Enter 0 to disable automatic word indexing.

The 'Startup' section includes the following checked options: 'Fast synchronize on startup', 'Start NEO Find when Outlook starts', 'Start minimized in tray', 'Open most recently used catalog on startup', and 'Check for NEO updates on startup'. The 'Your Addresses' section has a 'Your Addresses...' button and the text 'Ensure NEO Find knows all your addresses'. The 'Confirmation' section has a checked option 'Warn before combining names'. The 'Search update' section has a text box 'Automatically update word index every 30 minutes'.

## Reading Pane Options

These options relate to the Reading Pane.





## Formatting Options

These options set how items are formatted.

The screenshot shows the Outlook Options dialog box with the 'Format' tab selected. The dialog is divided into several sections: 'Name Format', 'Date Format in Lists', and 'Colors'. Callouts provide additional information for each section.

**Names in Correspondent View**  
Various arrangements of Last, First and Company values for these folders.

**Name Format**  
Folder list: Last, First - Company  
Item list: First Last

**Date/Time column in list pane**  
Relative dates apply for most recent two weeks, then absolute dates are used.

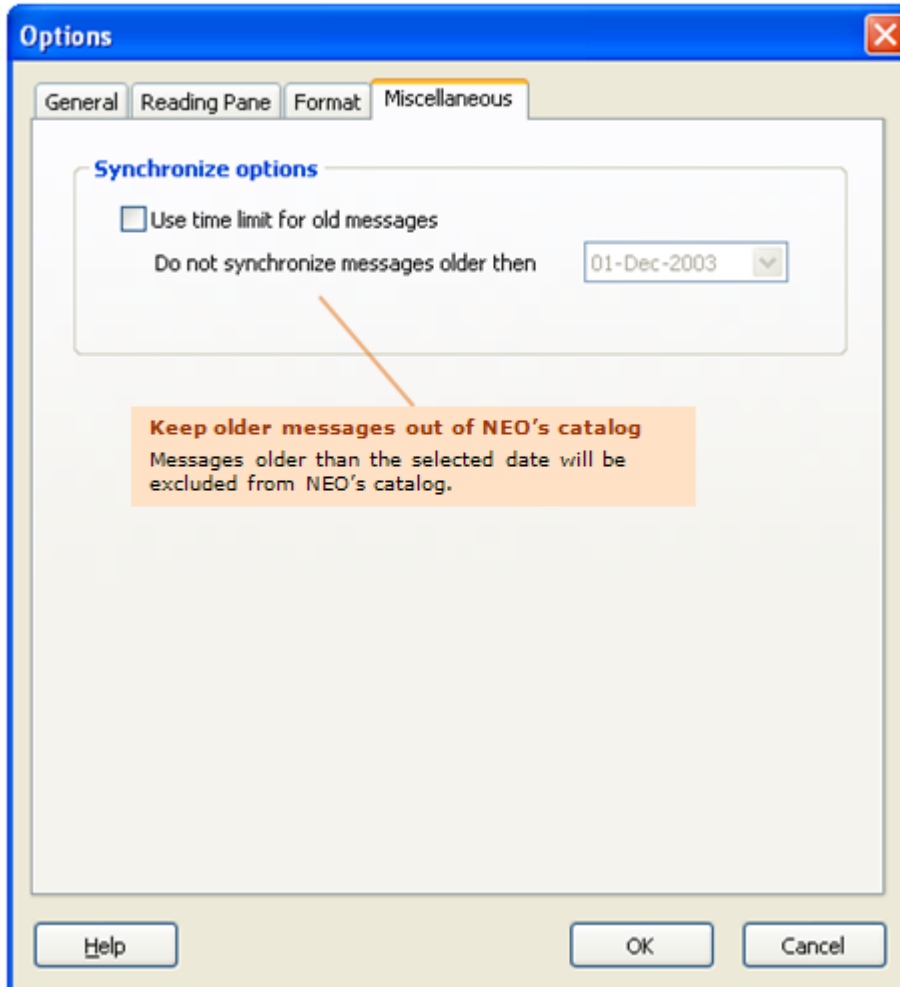
**Date Format in Lists**  
 Relative dates (e.g., Today 21:09)  
 Absolute dates (e.g., 13-Jan-09 21:09)  
Week begins on: Monday

**Colors**  
Sent messages: Window Text  
Received messages: Blue  
Filter background: Money Green

**Color Settings**  
You can choose standard colors or define your own color by selecting Custom.  
Click Apply to see how the changes look.

## Miscellaneous options

In this tab additional options can be set as described below.



## Other Ways to Customize

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### Resizing the Reading Pane

The Reading Pane can be positioned either at the bottom or to the right of the screen. This can be defined on View menu. Size of the Reading Pane can be changed to any desired size by dragging the pane separator to a new location. Switching off the Reading Pane is done through the View menu.

Note that you don't have to see the List Pane messages in order to read them in the Reading Pane. You can use the following shortcut keys to move from message to message:

**Ctrl + Up**                      Move to previous message

Ctrl + Dn

Move to next message

## Resizing panes

The panes in NEO can be resized. Place your cursor on the divider between the panes you want to resize and drag in desired direction.



## Changing Folder List sort order

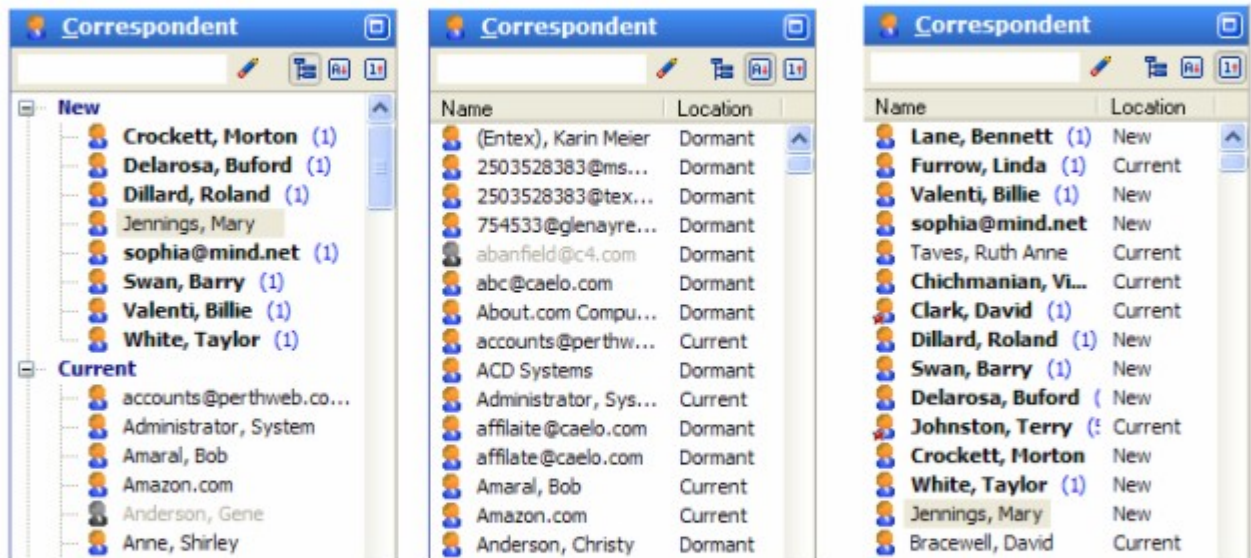
Each view can have its own sort order. Change the sort order by clicking one of the three buttons at the top right.

### Tree Order

Shows top-level folders, group folders and folders in a hierarchy.

### Alphabetical Order

Strictly alphabetical. Location shows which top-level or message store the folder belongs to.



### Recently used order

Folders that have had the most recent activity display first.

## Changing Reading Pane fonts

There are three message formats for the Reading Pane: HTML, Microsoft Outlook Rich Text, and Plain Text. Here's how to change the text characteristics.

### HTML messages

Change the relative size of HTML text in two ways:

- Click View menu | HTML Text Size.
- Set on via Reading Pane options (Tools menu | Options | Reading Pane tab)

### Plain text messages

Change the characteristics of Plain Text messages:

- Set on via Reading Pane options (Tools menu | Options | Reading Pane tab)

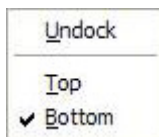
### Microsoft Outlook Rich Text

This message format cannot be modified in the Reading Pane.

## Moving the View tabs

The NEO View tabs are positioned by default at the top of NEO because the tabs are easier to access there. You can position them at the top or the bottom of NEO, and you can choose to show the graphic symbols or not.

**Right-click** on any part of the View tab and make your selection:



## Undocking and docking views

When you start NEO for the first time you will see the default NEO workspace. In it, Correspondent view is in the top left panel, Search is below it. The List Pane is on the top right and the Reading Pane is below it.

### Optimize view positions to suit your workflow

All view positions are configurable in NEO. You can undock any view and have it float above your workspace, you can dock the views onto the workspace surface in any position, you can change the order of the views on the View tab, and you can even hide a view.

### Save your Layout settings by exporting them

When you have finalized setting your layout, it is best to save your layout settings by exporting them: View | Layout | Export Layout.... When it is necessary to reset your User Interface it is easy to restore your layout by importing the saved settings.

### How to reset the User Interface

When you like to restart with the original layout, or when the User Interface needs to be reset:

### Reset your layout

On the View menu, click Layout | Reset Layout. This will restore your layout to the default layout.

### Reset User Interface

Close NEO, click Ctr+Shift while double-clicking NEO icon to start the program. Confirm dialog to reset the User interface settings.

## Configuring your views

The key point to remember when moving views is that a view can only be moved to a new location when it is undocked (floating).

### *Undock a view that is currently docked on the Viewtab*

Double-click the view on the Viewtab.

### *Undock a view that is currently docked on the workspace surface*

Double-click the titlebar of the view panel.

### *Dock an undocked view back onto the Viewtab*

Drag the floating toolbar's titlebar on top of the Viewtab. As you move it over the tabs, drop it when the insert indicator appears.

### *Dock a view onto the workspace surface*

If it is not already undocked, double-click the tab (if on the Viewtab) or double-click the titlebar (if already docked on the workspace surface).

Now that it is undocked, drag it by the titlebar to a dockable location. As you get close to a location it will snap into place with a line marker indicating its location. Drop it where you like.

To move it so that it appears as a vertical column, place your cursor exactly on the juncture between two stacked panes (for example, the dividing line between the List Pane and the Reading Pane).

### *Hide and restore a view*

To hide a view, press Alt+F4 when the view has the focus and is undocked.

To restore a hidden view, go to View menu | click Views then click the view you want to make visible again.

## Adding and changing columns

### Column sort order

Sort your messages by changing the column sort order.



The indicator on the Date/Time column signifies the current sort column. Click it again to change the sort direction, or click another column to change the sort column.

Each folder can have a different sort order.

## Changing column width

Place your cursor at the start of a column until the resize icon appears (see below), then drag it right or left.



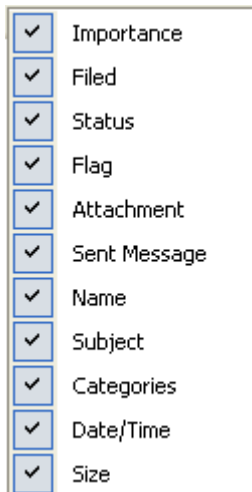
When you change the column width for a view, it changes for all views except Attachment view which can be set independently.

## Changing column order

Left-click drag the header of a column and drag it to the new location.

## Selecting which columns to display

Right-click on any column. This list of available columns will appear for you to check or uncheck.



## List pane Name column

The Name column in the List Pane shows the **From name** for incoming messages and the **To name** for outgoing messages. You can also choose to show Original name from message in this column.

Here are the different ways to set this property:

### Property Setting

#### Show in Name column

- Folder name
- Original name from message

### How it looks in the List Pane

Name

**OL**  
OL  
OL

#### Show in Name column

- Folder name
- Original name from message

Name

**bufocalvin@aol.com**  
Dani  
Sue Mosher

#### Show in Name column

- Folder name
- Original name from message

Name

**OL [bufocalvin@aol.com]**  
OL [Dani]  
OL [Sue Mosher]

Notice above that the folder name is very short to make more room for the original name. Also, specifying the folder name in upper case makes it stand out from the original name.

You can set what's included in the Name column by right-clicking any Correspondent folder and choosing Folder Properties.

## Customizing toolbars and the menu

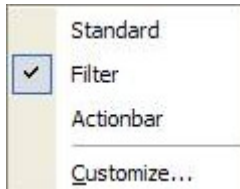
By default, NEO has one menu and one or two default toolbars. You can customize these in several ways:

- hide or show toolbars
- move and undock toolbars
- customize toolbars
  - add commands
  - modify commands
  - remove commands
  - reset toolbars
- customize how the menu works

It's useful to modify your toolbars to add commands you use frequently, or hide ones you use infrequently. You can even combine commands onto your own single toolbar to save space.

### Hide or show toolbars

Right-click anywhere on the menu or toolbar and check or uncheck an toolbar to show or hide it.



### Move and undock toolbars

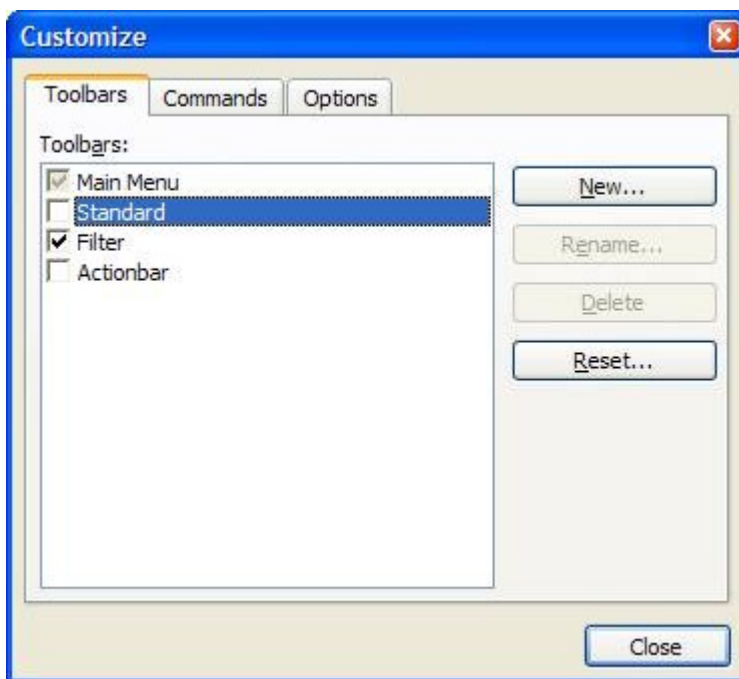
Place your cursor over the grip at the left of the toolbar and drag it out of position. As you drag it away it will become undocked (floating). You can resize and reshape it while undocked.

As you move it near a dockable location it will snap into place.

### Customize toolbars

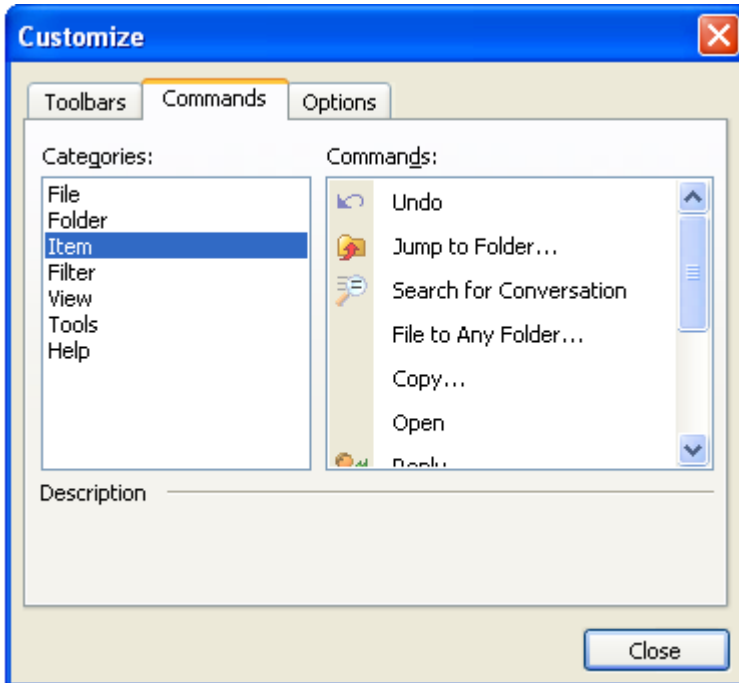
Customize a toolbar by right-clicking anywhere on a toolbar and choosing Customize.

You can create a new toolbar, rename and delete toolbars you create, and reset default toolbars back to their original state.





### Add a command



Select a command Category then location the desired Command. Drag and drop the command onto the toolbar in the location you want.

### Modify a command

With the Customize dialog visible, right-click a command on the toolbar. A black box should appear around it to show you are in edit mode and the command edit will appear.

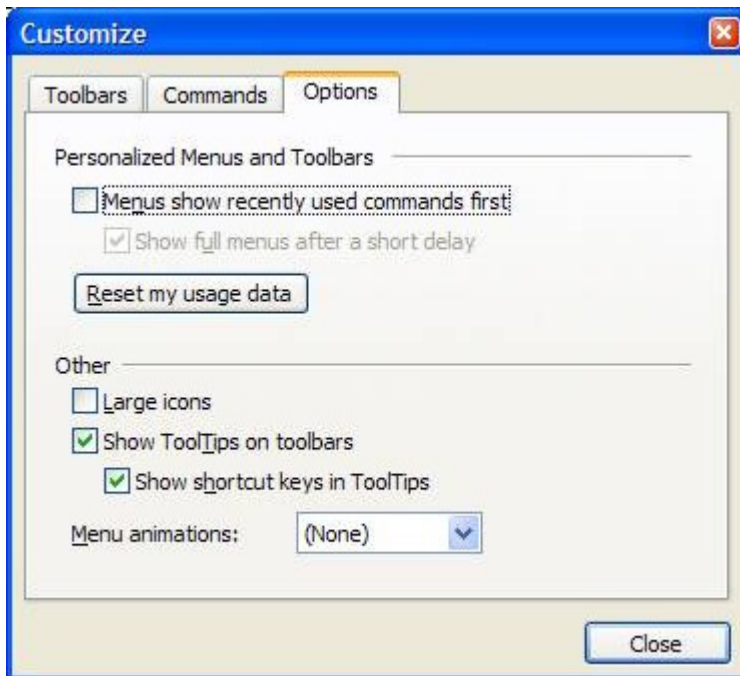


### Delete a command

Modify a command as per above, and choose Delete.

## Customize menu and toolbar options

You can change the behavior of the menu and toolbars by going to the Options tab of the Customize dialog.



## Email Improperly Configured on your computer

You may receive an error issued from Microsoft Outlook when you start Outlook or NEO. Here's how to address the problem.

### Ensure you are running the correct Microsoft versions

NEO works with all Microsoft Outlook versions but does not work with Outlook Express.

NEO also works with Exchange Server. For Exchange Server Version 5.5 Exchange Service Pack 3 or above must be installed. For Exchange 2000 Server, Exchange Service Pack 2 or above must be installed. Your Exchange administrator can provide this information.

### Other ways email may not be properly configured

NEO requires that both Microsoft Outlook and MAPI are properly configured on your computer. MAPI is an email subsystem that is normally installed when you install Microsoft Outlook.

However, components of Outlook and/or MAPI can get corrupted. This can occur when you change versions of Microsoft Outlook or add new features, when you change modes such as from Internet Only Mode to Corporate or Workgroup mode, or when you use some other email programs that replace the correct version with their own versions of MAPI.

Here are the steps to take to ensure your email subsystem is properly configured. All steps may not be required. You may want to print this topic by clicking the Print command on the Help toolbar.

1. Close NEO, Outlook and any other programs you have running. To be absolutely sure no email component programs are running it is best to restart your computer (assuming such programs don't start automatically on startup). The following steps will not work if any part of MAPI is running.
2. Ensure "Microsoft Outlook" is your default email program. To change the setting: click Start, point to Settings, click Control Panel, then double-clicking the Internet Options icon. Click the

Programs tab, then choose Microsoft Outlook as the E-mail program. Do not choose Outlook Express.

3. Run the Microsoft FixMAPI program. This program does not exist on all computers. To find whether it exists on your computer, click Start, point to Find then click Files or Folders. Enter `fixmapi.exe` in the Named field and click Find Now. If it is found, perform the following substeps:
  - o Click Start, point to Find then click Files or Folders. Enter `mapi32.dll` in the Named field and click Find Now. Right-click each copy found, click Rename and enter `mapi32.old` . If you are not able to rename all files then MAPI is running and you should perform step 1 above. Close the Find program.
  - o Click Start, click Run, enter `fixmapi.exe` in the Open field and click OK. This will run quickly and provide no confirmation information that it has completed.
  - o Restart your computer and try NEO.
4. Re-install Microsoft Outlook. Perform this step ONLY if step 3 above was unsuccessful.
  - o Click Start, point to Settings then click Control Panel. Double-click the Add/Remove Programs icon and then double-click Microsoft Outlook from the list. Have your install CD handy.
  - o After re-installation, restart your computer and try NEO.

If none of the above steps correct the problem, please send an email to [support@caelo.com](mailto:support@caelo.com) describing your symptoms and what steps you have taken.

# Using with Outlook

## Switching Between NEO and Outlook


---

You can switch between NEO and Outlook in two ways:

### From NEO

1. Click the Outlook button  on the toolbar, or
2. Press Ctrl+0.

### From Outlook

1. Click the NEO button  on the toolbar, or
2. Click Tools menu | Switch to NEO Find.

If the program you are switching to is not open, it will be opened.

## Interacting with Outlook items

---


Here are actions you can take on Outlook items from within NEO:

### Switch quickly to Outlook

Switch to an area in Outlook such as contacts, calendar in two ways:

- a) Click the **Outlook** command on the NEO toolbar, or (or press Ctrl+0 (zero))
- b) Click the **black triangle** to the right of the Outlook command on the NEO toolbar and choose to go to a particular area of Outlook, or press these shortcuts to go to:

Ctrl+0 Outlook  
Ctrl+1 Inbox  
Ctrl+2 Calendar  
Ctrl+3 Contacts  
Ctrl+4 Tasks  
Ctrl+5 Notes  
Ctrl+8 Journal

- c) Double-click an Outlook **non-mail folder**  in Outlook view.

### Work with Outlook mail folders

In Outlook view, work with these just as you would your folders in Outlook.

## Interacting with Contacts and Address Books

---

NEO interacts with Contacts in two ways.

## When creating new Correspondent folders

When automatically creating a new Correspondent folder, NEO imports relevant contact information such as name, company, telephone numbers and email addresses.

NEO first checks to see if a Contact exists for the address based on an email address match. If a Contact matches, correspondent information is taken from the Contact. If no contact is matched, then NEO does a lookup in all Address Books for a matching entry. If a match is found, correspondent info is taken from the Address Book. NEO adds all addresses from the Contact/AddressBook to the Correspondent folder, except for addresses that already exist in NEO.

Note that this is a one-time import from Contacts and is not synchronized in an ongoing way. If you make changes to the Correspondent fields they are not then reflected in your Contact.

## How NEO Works with Exchange Server

---

NEO works with Microsoft Exchange Server mailboxes. However, NEO is an email organizer. It does not organize other Outlook object types such as calendar items, journal items, and note items.

Here are some notes about using NEO with Exchange Server:

### NEO is a client-side product

That means NEO installs and operates completely on your computer. There is nothing about NEO that gets installed on the server or that is related to Exchange Server. In fact, Exchange Server is completely unaware of NEO.

### You can organize your Mailbox, your PSTs and your IMAP folders

If you are using NEO you can include your mailbox and as many PSTs or IMAP folders as you like in your catalog. NEO will give you a seamless view to all your messages as if they all reside in one large single area.

### Using your offline message store (OST)

When using Offline mode, a Full Sync may sometimes be needed to updated deleted messages in NEO.

### Offline mode using Outlooks prior to Outlook 2003

If you have offline access enabled (you use an offline message store), you should select all your email folders for OST/Mailbox synchronization. In addition, you should not set filters for your folders.

You will not lose messages when you do this; however, if you do not include all your folders NEO may spend quite a bit of time removing and adding messages in the catalog each time you switch between your OST and your mailbox.

If you have instructed Outlook to automatically Outlook synchronize your Exchange mailbox with your OST when exiting an online session, you must shut down Outlook without NEO running for the synchronize to be performed.

## Cached Exchange Mode in Outlook 2003/2007

NEO works with normally with Cached Exchange Mode.

### Reminder – Synchronize each time you re-connect to the LAN

Whenever you re-connect to the LAN, you must synchronize to update NEO with new messages from your mailbox. Note that you can configure NEO to automatically Fast Sync on startup.

## Synchronizing with Outlook

---

NEO normally displays all the messages in your message store(s). However, NEO doesn't know about new, changed or deleted messages that are processed when NEO is not running.

### How it works ... in a nutshell

If NEO is running when new messages arrive, are changed or deleted, then you'll always see all your messages in NEO (NEO keeps you synchronized on-the-fly).

If NEO is not running, then NEO will not know about these message events and will need to get synchronized again by you syncing manually (e.g., when you next start NEO).

## Always run NEO

---

It's best to always have NEO running when Outlook is running so your email stays synchronized. You can configure from the Tools | Options menu to start NEO together with Outlook. You can even select to start NEO minimized in the tray so it will never be in your way when starting Outlook.

# NEO Views

## Overview - Views

---

### The power of NEO Find

NEO Find contains Caelo's patented short-cut technology to show messages automatically in more than one location without copying the message.

NEO Find contains the three most frequently used views (Outlook, Correspondent and Search) for you to easily retrieve your emails. FYI: NEO Pro has nine different views.

In views, messages appear in more than one location at the same time. Every message will always be in the Correspondent folder of the person communicated with. It will also always be in the Outlook folder containing the message. It can further be in a search results folder in the Search view if you find it in a search. Once a message is deleted, it will be removed from all your views.

It is important to realize that the Correspondent Folders are always referencing ALL messages from a single Correspondent (whether Sent or Received). So, even when a message is moved within the Outlook system (e.g. from the Inbox to another folder), it will still show in the Correspondent Folder as if it did not move – in fact, the reference in the Correspondent Folder for this message is automatically updated to the new location when moving a message (you can see the changed location in the Preview Pane where the containing folder is shown).

In short, even though you see the same message in different views, it's really just one message presented to you in different ways.

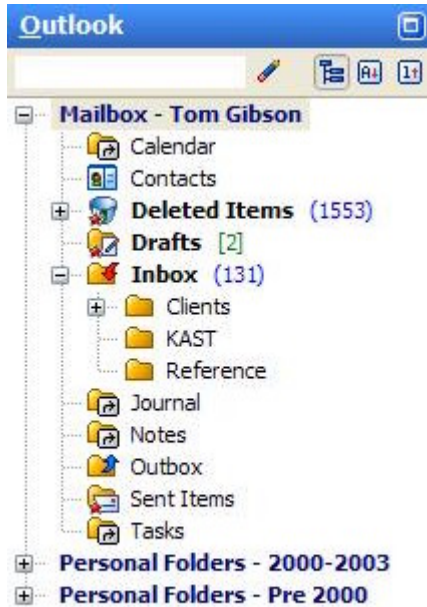
**This now is the beauty of NEO Find:** although messages may move within your Outlook system (and you may forget where it is filed away), you will always find all your messages to or from a person in the Correspondent Folder – no matter where it is located in your Outlook system.

### Using views

Views don't require any work – they're set up and maintained automatically for you to use.

# Outlook View

---



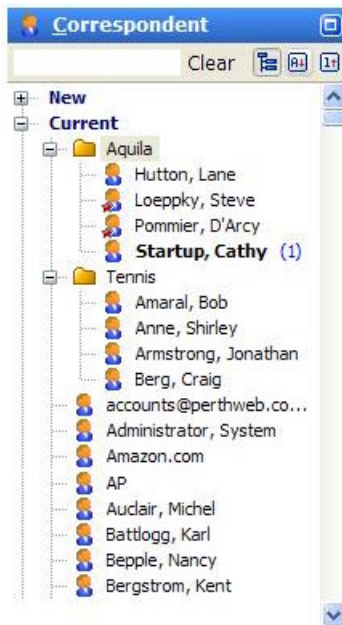
## Outlook View

Outlook view is your view into your Outlook Folder List.

The example at left shows multiple message stores (PST files).

# Correspondent View

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## Correspondent View

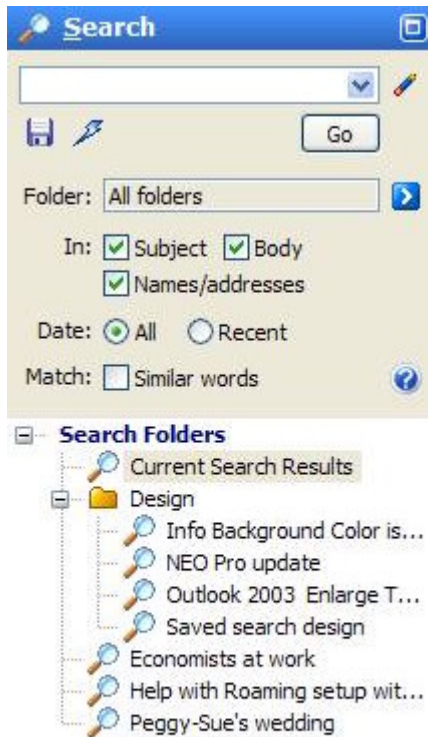
Lists all people you correspond with. These include people you send messages to and people who send messages to your email address(es).

Although these folders are virtual folders (*they do not exist in reality in your Outlook system*), they behave like real folders – most importantly you can search through these folders using the Search facility (press F6 to launch a Search in Folder).



# Search View

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## Search View

NEO's search is an indexed search facility. It's extremely fast because all the words in all your messages are automatically indexed.

Besides a search through the entire Outlook system, Search is particularly powerful to search through the virtual Correspondent Folders (select a Correspondent Folder and press F6 for a Search in Folder)

In NEO Find you can save search folders (as shown at the bottom).

# Working with Messages

## Once messages are found

---

Once you have found a message (see Chapter: Finding Emails), you can perform several actions.

### Open a message (Enter or Ctrl+O)

Double-click a message in list view, or select a message and press Enter or Ctrl+O to open a message in Outlook.

### View message thread (F7: Search for Conversation)



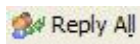
Press F7 to find related messages in same conversation thread (see below).

### Reply to a message (Ctrl+R)



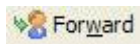
Click the Reply toolbar command, or enter Ctrl+R. After entering the message contents, click Send.

### Reply to all respondents in a message (Ctrl+Shift+R)



Click the Reply All toolbar command, or enter Ctrl+Shift+N. After entering the message contents, click Send.

### Forward a message (Ctrl+F)



Click the Forward toolbar command, or enter Ctrl+F. After entering the address information and the message contents, click Send.

### Jump to Folder (Ctrl+J)



Jump to the containing folder of the message. When folder is organized in more than one folder, a selection screen will show to select the folder to jump to.

### Use message as attachment

When you like to add the message as attachment to a new message, simply drag-and-drop the message from NEO's message list to the new mail window.

### File message to another folder (Ctrl+F)

Right-click the message and select File to Any Folder.

### Mark Read/Unread (Spacebar / Shift+Spacebar)

Pressing Spacebar or Shift+Spacebar will mark a message Read or Unread.

## Delete a message (Del)

Simply press the Delete key to move a message to the Deleted Items folder. Pressing Ctrl+Z will undo this delete action.

## Moving Back and Forward

---

Use the back and forward commands to quickly jump back or forward to previously-visited folders. This is very useful, for example, after performing a search.

The Back and Forward buttons are located on the right side of the header above the list columns:




Or press **Alt+Left** for Back or **Alt+Right** for Forward.

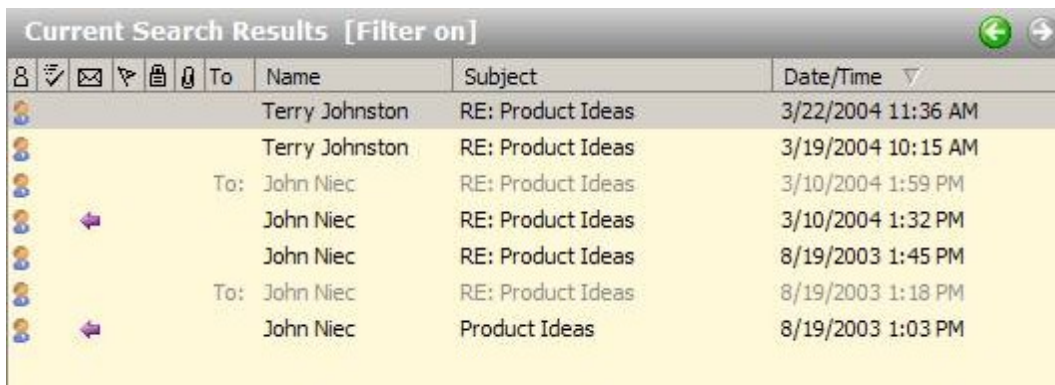
## Search on Conversation

---

To quickly see all related messages:

- Click  Search for Conversation on the Standard toolbar, or
- Press F7.

You will then be quickly positioned in Search view with all messages based on the same 'conversation' displayed.



The screenshot shows a window titled "Current Search Results [Filter on]" with a list of messages. The list has columns for icons, Name, Subject, and Date/Time. Messages are grouped by conversation, with "To:" labels and arrows indicating replies.

| Icons  | Name           | Subject           | Date/Time          |
|--------|----------------|-------------------|--------------------|
| [User] | Terry Johnston | RE: Product Ideas | 3/22/2004 11:36 AM |
| [User] | Terry Johnston | RE: Product Ideas | 3/19/2004 10:15 AM |
| [User] | To: John Niec  | RE: Product Ideas | 3/10/2004 1:59 PM  |
| [User] | John Niec      | RE: Product Ideas | 3/10/2004 1:32 PM  |
| [User] | John Niec      | RE: Product Ideas | 8/19/2003 1:45 PM  |
| [User] | To: John Niec  | RE: Product Ideas | 8/19/2003 1:18 PM  |
| [User] | John Niec      | Product Ideas     | 8/19/2003 1:03 PM  |

When done, click  or press **Alt+LeftArrow** to go back to the folder you came from.

### About 'Conversation'

Every message has a property called Conversation, and it is usually the same as the Subject property but it can be different.

When a new message is created, the current Subject is copied to the message's Conversation. However, if the Subject is edited, the two will be different. Conversation always remains as the original Subject.

## Deleting Messages

---

### Deleted messages go to Deleted Items

To delete a message or messages, highlight the message(s) and press the Delete key

When messages are deleted in NEO they are moved without warning to your Deleted Items folder in Outlook. You can get them back if you need to by moving them from Deleted Items to another folder or by pressing Ctrl+Z (Undo) immediately after the delete action.

**Note:** When you delete a message, the message will be removed from all views within NEO.

### Deleting saved search folders (Alt+Del)

If you delete a saved search folder (Alt+Del), just the saved search results are deleted – the underlying messages remain.

## Undoing Actions

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You can UnDo (reverse) some operations in NEO. Keep in mind that only the last action can be undone.

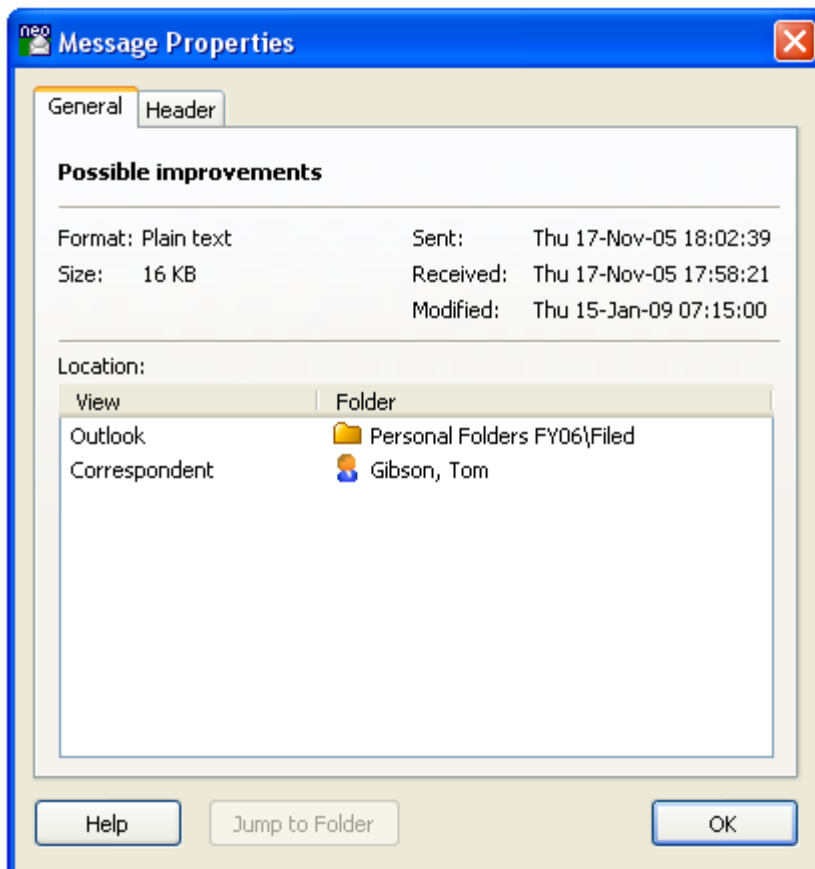
To UnDo an action, press Ctrl+Z or select UnDo from the Edit menu.

## Viewing Message Properties

---

Right-click any message in list view then click Message Properties.

**Location** lists the NEO folders that contain the selected message. This is especially useful for determining in what Correspondent and Outlook folder a selected message is stored in. Note that you can also see what Outlook folder a message is stored on the **Folder** field on the Reading Pane header.



## Message Symbols

---

See **Reference** section at end of Help.

# Working in the Reading Pane

## NEO's Reading Pane

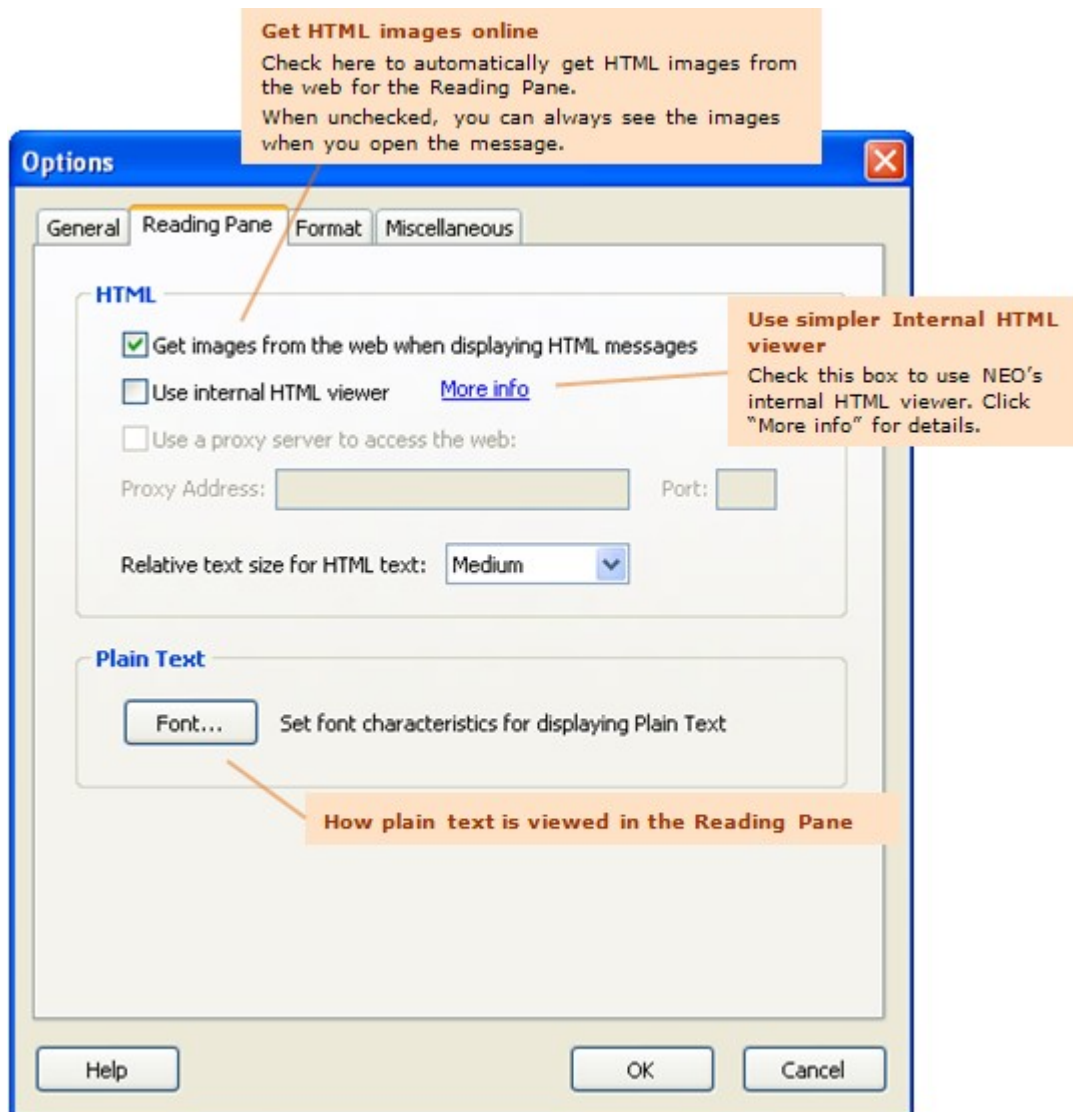
---

The Reading Pane displays beneath or to the right of the Message List Pane.

## Reading Pane Options

---

These options relate to the Reading Pane.



## Clicking Links to Launch Your Browser

---

If your browser is open when you left-click a web link, the page *replaces* the current page loaded in your browser. To launch a web-link in a *separate* browser window, left-click the web link while holding down the Shift key.

- Click link** Launch web-link in your **current browser window** (replacing currently loaded page).
- Shift+Click link** Launch web-link in a **new browser window**.

See keyboard shortcuts on the Help menu for a list of all keyboard shortcuts.

## Resizing the Reading Pane

---

The Reading Pane can be positioned either at the bottom or to the right of the screen. This can be defined on the View menu. Size of the Reading Pane can be changed to any desired size by dragging the pane separator to a new location or by using the keyboard shortcuts. Switching off the Reading Pane can be done through the View menu.

### Keyboard shortcuts

- Ctrl + Alt + Up Reading Pane On
- Ctrl + Alt + Down Minimize Reading Pane
- Shift + Ctrl + Up Increase Reading Pane
- Shift + Ctrl + Down Decrease Reading Pane
- Shift + Ctrl + PageUp Maximize Reading Pane
- Shift + Ctrl + PageDown Restore Reading Pane

Note that you don't have to see the List Pane messages in order to read them in the Reading Pane. You can use the following shortcut keys to move from message to message:

- Ctrl + Up Move to previous message
- Ctrl + Dn Move to next message

## Changing Reading Pane Fonts

---

There are three message formats for the Reading Pane: HTML, Microsoft Outlook Rich Text, and Plain Text. Here's how the change the text characteristics.

### HTML messages

Change the relative size of HTML text in two ways:

- o Click View menu | HTML Text Size.
- o Set on via Reading Pane options (Tools menu | Options | Reading Pane tab)

## Plain text messages

Change the characteristics of Plain Text messages:

- o Set on via Reading Pane options (Tools menu | Options | Reading Pane tab)

## Microsoft Outlook Rich Text

This message format cannot be modified in the Reading Pane.

# Choosing the HTML Reading Pane Viewer

---

## What is the HTML Reading Pane?

Messages displayed in the Reading Pane are displayed in one of three formats: Plain Text, Rich Text, or HTML. The HTML Reading Pane Viewer displays messages when they are in HTML format.

In NEO, the default HTML Reading Pane Viewer is the **Microsoft HTML Viewer**. This is the same viewer that is used in the Outlook Reading Pane. Our **Internal HTML Viewer** is a simpler viewer with considerably less extensive display capabilities.

## Which viewer should you use?

We recommend that you use the Microsoft HTML Viewer. Here are the differences between the two.

| <b>Microsoft HTML Viewer</b>  | <b>Internal HTML Viewer</b>                          |
|---|--|
| Works with Internet Explorer versions 5.0 and above (not selectable with pre-IE5.0) | Works with Internet Explorer versions 4.0 and above. |
| Displays messages just like Outlook does in its Reading Pane.                       | Does not display some HTML objects as well.          |
| Faster display when moving from message to message.                                 | A little slower.                                     |
| Email security (see below)  | Email security (see below)                           |

## More information about Email Security

In general, message Reading Panes can and have been vulnerable to email viruses.

When choosing the Microsoft HTML Viewer, NEO uses the security zone settings in Outlook in Options | Security. Taking it one step further, NEO also ensures scripts will **never** run and



ActiveX controls are deactivated regardless of your version of Outlook or security zone settings. Note that using the Microsoft HTML Viewer in the NEO Reading Pane is no riskier than the Outlook reading/preview pane, and may be safer.

The Microsoft HTML Viewer is a component of Microsoft Internet Explorer. You get the latest version whenever you update your Internet Explorer. To minimize security risks Microsoft **strongly recommends** that you periodically download and install the latest critical security updates for Internet Explorer, which can be obtained from <http://www.microsoft.com/windows/ie/default.asp>. This can be automated if you wish by using Microsoft's Windows Update.

NEO's Internal HTML Viewer is safe regardless of your version of Outlook or your security zone settings, but is not as rich in its display capabilities.

**Note:** We may discontinue support for the Internal HTML Viewer in future versions of NEO.

# Filtering

## Filtering Overview

---

Filtering is ability to temporarily show certain types of messages. It's great for zeroing in on certain types messages such as Sent or Received messages.

### Filter basics

- Filters are fast. They can be set and cleared very quickly.
- Filters are temporary. They never affect your messages, just what folders or messages that you see. You can always clear them.
- Filters are global - they operate across all message stores, views and NEO folders.
- Filters are sticky - if you set a filter it remains in place until you change it, even if you restart NEO.
- When a filter is 'on', the background of the List Pane and/or the Folder List changes color to make it obvious a filter is applied.

## Filtering in NEO Find


---

NEO Find has a Filter toolbar. The Filter toolbar consists of filter sets that fit together logically. You can combine your filters in any combination that you like.

Below the Filter toolbar is shown in its filter sets:

Filter: Clear Disable

**Filter Controls:** **Clear** clears the filter so that all messages show. **Disable**, temporarily disables the filter so you can quickly see all the messages. Clicking Disable again reinstates your current filter.

Folder: 

**Folder:** Shows only **folders** with **Unread** messages. This filter is a folder filter and acts on the Folder Lists.

Status:    

**Message Status:** Choose from **Unread**, **Unfiled**, **Flagged** or **Important**, singly or in any combination.

Dir:  

**Direction:** Show **Received** messages only or **Sent** messages only.



**Date filter:** A flexible From... To... filter.

Age:  ▾

**Message age in Days:** Message **age** from today. 1 day shows today's messages, 2 days shows today's and yesterday's messages, and so on.

## How to tell when a filter is on

Whenever a filter is on, the background color of parts of NEO display in a different color. For folder filters ('Show folders with Unread'), the Folder List background color is changed. For message filter sets (all others) the Message List Pane background is colored. You can change the background color in options.

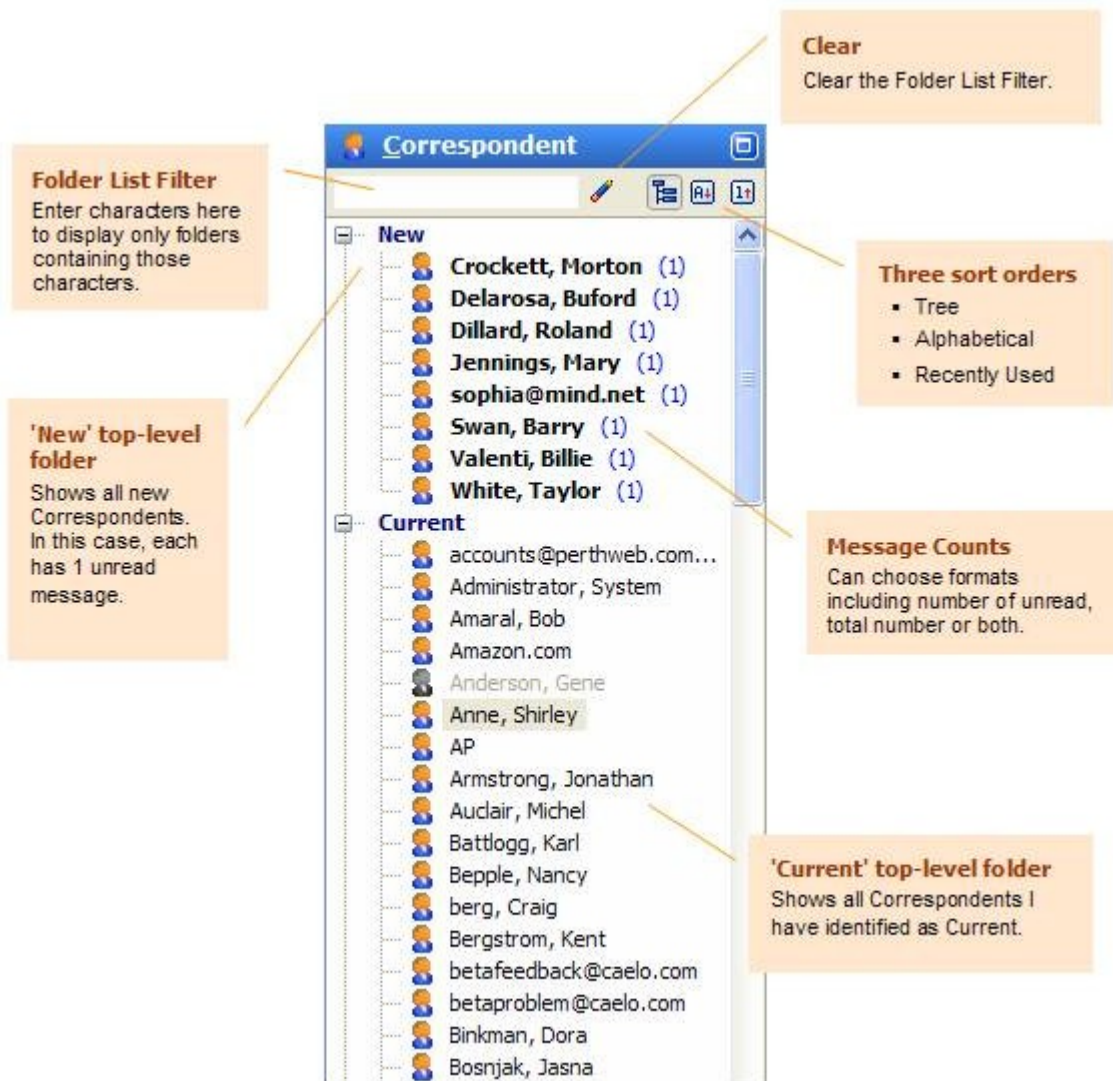
## Clearing a Filter

To clear the filter in NEO, simply click the filter commands again so that they are disabled (they show without a border).

# Folder Lists

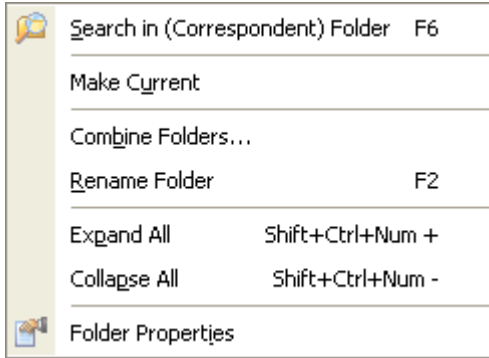
## Overview to Folder Lists

Each NEO view has its own Folder List. When a folder in the list is selected its messages are displayed in the List Pane.



## Folder Basics

Folders are containers for your messages. The operations you can perform on folders vary depending on the type of folder. To see the available operations for a folder, **right-click the folder**. Here's are the available operations for a Correspondent folder:



## Common folder operations

- Search in folder** Go to Search view with the folder selected for searching.
- Combine folders** Combine one folder with another. You can also drag and drop the source folder onto another.
- Remove folder** Delete a folder without deleting the underlying messages - **Alt+Del**.
- Rename folder** Change the name of a folder - **F2**.
- Folder properties** View the folder properties - **Enter** or **double-click**.

## Special folder operations

- Empty folder** Permanently delete the folder's messages (available for Deleted Items and Spam Folders).
- Make Current** For views containing the New, Current, Dormant folders, move folder into the Current area.
- Make Dormant** For views containing the New, Current, Dormant folders, move folder into the Dormant area.
- Refresh search** Re-run a search folder to update it based on its search parameters.
- Jump to Outlook** Jump to the corresponding Outlook folder. Do this for Contacts, Calendar, etc. as well as your user-defined folders - **Enter** or **double-click**.

## Finding Folders in the List

---

The fastest way to find a folder in long Folder Lists is to use the Folder List Filter. Enter characters into the textbox at the top, and the list will display only those folders with the characters in it.

For example, to quickly find Mary Jennings folder, entering 'mary' is sufficient to reduce the folder set to a small enough set to select it.



Notice that when a filter is in effect, the background is displayed in the filter background color.

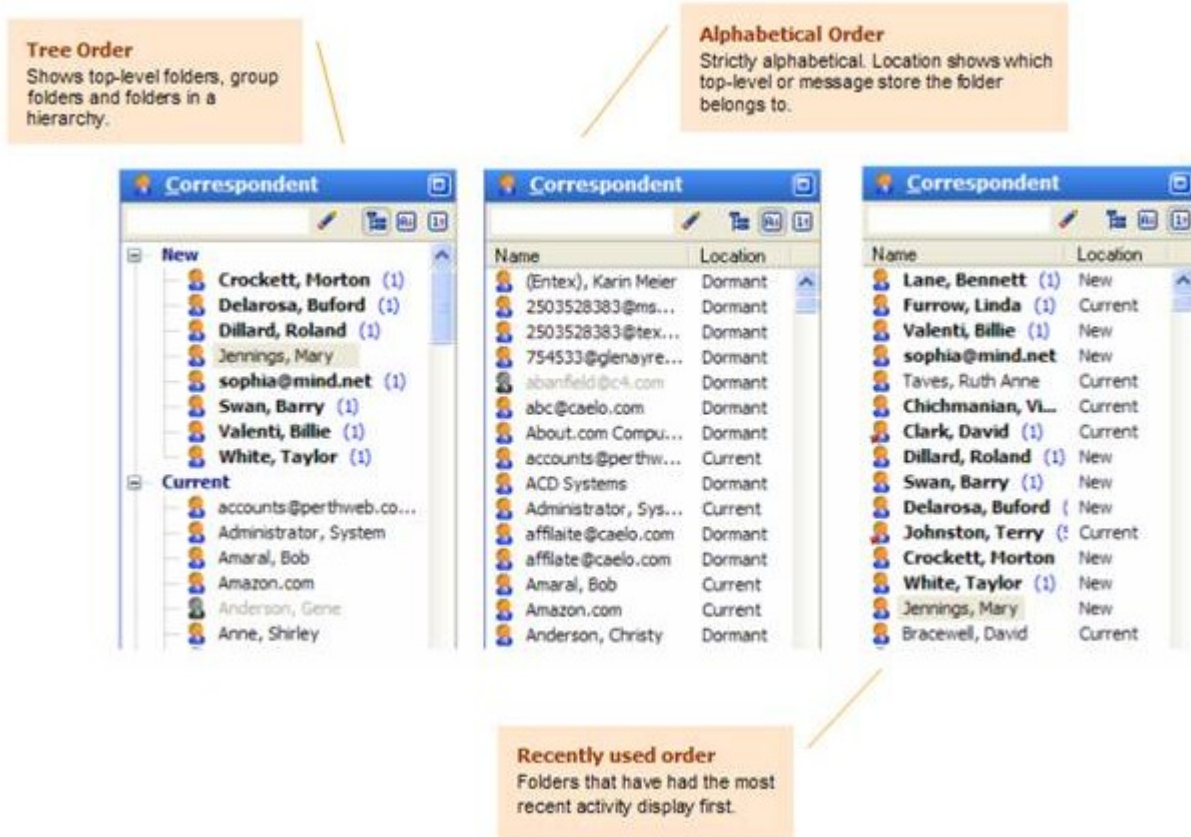
Here are some shortcut commands to make working with the Folder List Filter easier:

- Esc** Clear the Folder List Filter
- F3** Jump to the Folder List Filter in the current view
- F5** Jump to the Correspondent Folder List Filter.

## Sorting the Folder List

---

Each view can have its own sort order. Change the sort order by clicking one of the three buttons at the top right.



## Expanding and Collapsing the Folder List

---

When in Tree Sort Order, the tree displays in a hierarchy. Expand a branch by clicking the Plus **+** symbol. Collapse a branch by clicking the Minus **-** symbol.

Keyboard shortcuts (using the number keypad):

- Num +** Expand current folder in Folder List
- Num -** Collapse current folder in Folder List
- Shift+Ctrl+Num +** Expand all folders from anywhere in list
- Shift+Ctrl+Num -** Collapse all folders from anywhere in list

## Top-level folders – New, Current and Dormant

---

Some views have top-level folders. Top-level folders are folders managed automatically by NEO to help you organize your folders. You can also organize folders in top-level folders manually.

In Correspondent view the New top-level folder displays all folders that have been newly created..

### Automatic organization

You can choose to have NEO automatically move Correspondents from New to Current, and from Current to Dormant based on day-age parameters you provide. You can also specify that Dormant folders are moved back to Current when they become active again (e.g., receive a message).

You could specify that New folders automatically move to Current after 30 days, and Current folders automatically move to Dormant after 365 days of inactivity. A folder remains inactive until a significant event occurs such as it receives a message.

By **disabling** automatic moving of folders you would retain control over where a folder is located.

To set the automatic organization of folders, right-click a top-level folder such as New, Current and Dormant and choose Folder Properties.

### Manual organization

You can manually move folders from New to Current, Current to Dormant and so on in two ways:

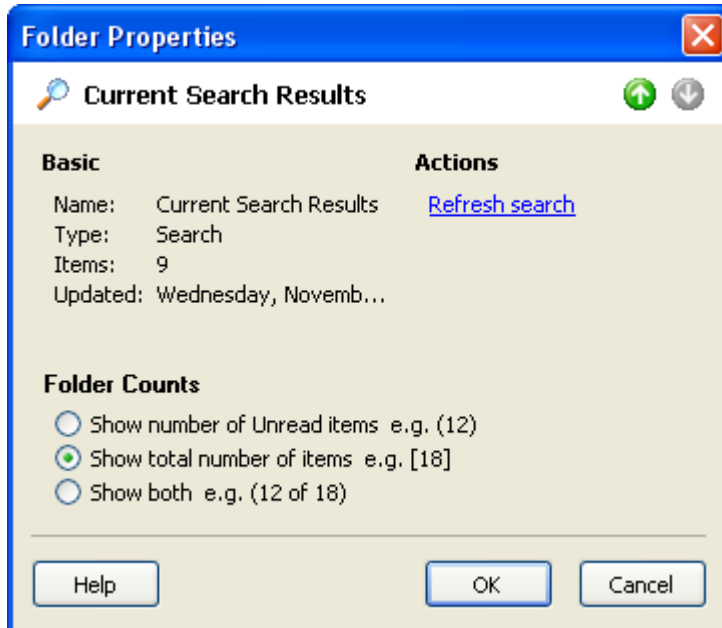
1. Drag and drop the folder from one group onto the **branch** of the other. Drop it on the top-level folder itself (e.g., Current). If you drop it on a folder, NEO will think you wish to combine folders.
2. Right-click the folder and choose **Make Current** or **Make Dormant**.



# Folder Properties

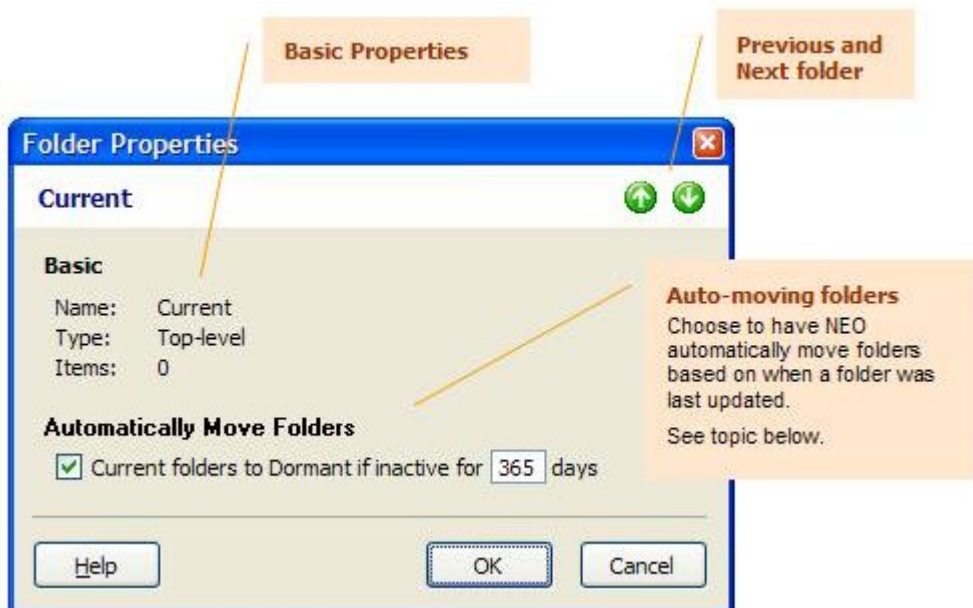
## General Folder Properties

These properties apply to all Search folders.



## Top-level folder properties

Top-level folders group your folders at the highest level.



## Correspondent folder properties

These properties apply to Correspondent folders.

**What to show in List Pane**  
Ideal to choose Original name from message if there are many authors (e.g., mailing lists).  
See topic below.

**Previous and Next folder**

**Folder Properties**  
Binkman, Dora

**Basic**  
Type: Correspondent  
Items: 0  
Updated: n/a  
Is Hot: No

**Show in Name column**  
 Folder name  
 Original name from message

**Addresses or address patterns**

| Address / pattern  | Behavior |
|--------------------|----------|
| dbinkman@caelo.com | Direct   |

**Outlook Contact**  
[Look up Address Book](#)

**Folder Counts**  
 Show # of Unread items  
 Show total # of items  
 Show both

**Actions**  
[Combine folder with...](#)  
[Move folder to...](#)

**Managing the Correspondent's Addresses**  
You can add single addresses and/or address patterns based on the email address or the email name.

**Set how your counts display**  
Unread counts display in blue, Total counts display in green.

**Available actions**

Buttons: Change..., Add..., Move..., Remove, Help, OK, Cancel

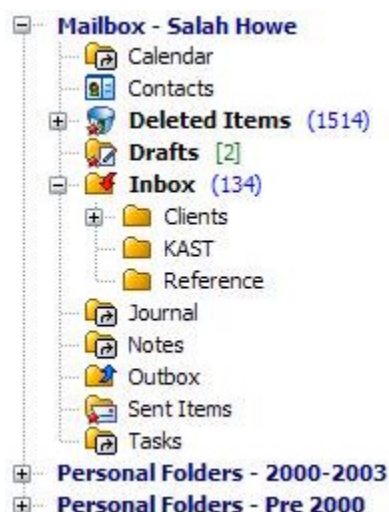
[Back to Table of Contents](#)


# Outlook Folders


## Overview – Outlook Folder List


---

Outlook view is your view into your Outlook Folder List.



**Your mail folders:**  Your user-defined mail folders in this pane are your *actual Outlook folders*.

**Outlook folders:**  Your special Outlook folders such as Drafts, Deleted Items, etc. are also here.

**Non-mail folders:**  These are shown but cannot be accessed from within NEO Find.

## Working with user-defined folders

---

The folders you create in Outlook are visible to you here. In fact, the folders in Outlook view are your actual folders in Outlook.

### Viewing user-defined folders in NEO

Simply select any folder in the Outlook view, just as you would select any folder in the NEO views.

### Moving messages to Outlook folders

Move any message from anywhere in NEO to your user-defined folders. Simply drag and drop the message(s) onto the folder or right-click the message and select File to Any Folder.

### Copying messages to Outlook folders

Right-click drag the message to a user-defined folder. When you release you will be prompted as to whether you want to copy or move.

## **Excluding folders from being organized in NEO**

---

You can exclude messages from Outlook folders from being organized into Correspondent folders.

You would typically do this for Spam folders, but you can also do it for any folder that you don't want to see in NEO.

To change the Exclude setting:

1. Right-click on the folder in Outlook view.
2. Select Folder Properties.
3. Set the option in the Exclude from NEO section.

Note that by default, Excluded messages are included in NEO searches. However, you can optionally choose to search all folders except Excluded and Deleted Items.

# Correspondent Folders

## Overview

---

### Overview

All mail in NEO is automatically organized into Correspondent Folders. As this is most natural way people tend to think about their email, this automatic organization provides a very easy and intuitive way of finding older emails back. It is not relevant anymore where emails are filed away as they will always appear where they are expected to be: in the folder of the correspondent involved in the communication.

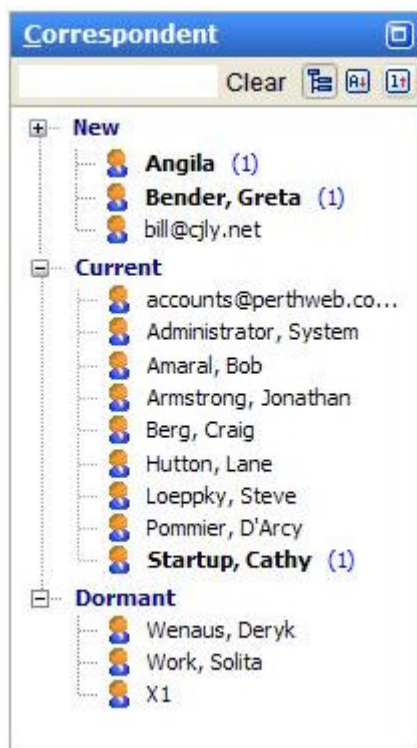
Correspondent folders contain all Sent and Receive emails – no matter where they are located within your Outlook system. Also when emails are moved around (being filed or moved into an archive folder), they will continue to show in the Correspondent Folder as NEO will automatically update the reference to the email when they change location.

### Correspondent Folders

#### All your mail is automatically organized by Correspondent

NEO automatically creates Correspondent folders as you communicate with new people. All subsequent messages are automatically filed by correspondent.

These are **virtual folders**. The messages are seen here in addition to the Outlook folder they are permanently stored in.



Both Sent and Received messages are shown together.

New Correspondents arrive into the **New** area. You can manually move folders to **Current** or the **Dormant** areas.

Or you can set parameters to have the Correspondent folders **move automatically between levels** according to message activity based on date.

## Keeping Your Addresses Up to Date

### About Your Addresses

NEO needs to know which addresses are yours in order to automatically organize your messages. If all your addresses are not entered, your messages will not appear correctly.

Note that **NEO must know all your addresses** - not just your currently used ones. Be sure to include your old addresses if you have messages that used them.

### Auto-detecting your addresses on catalog creation

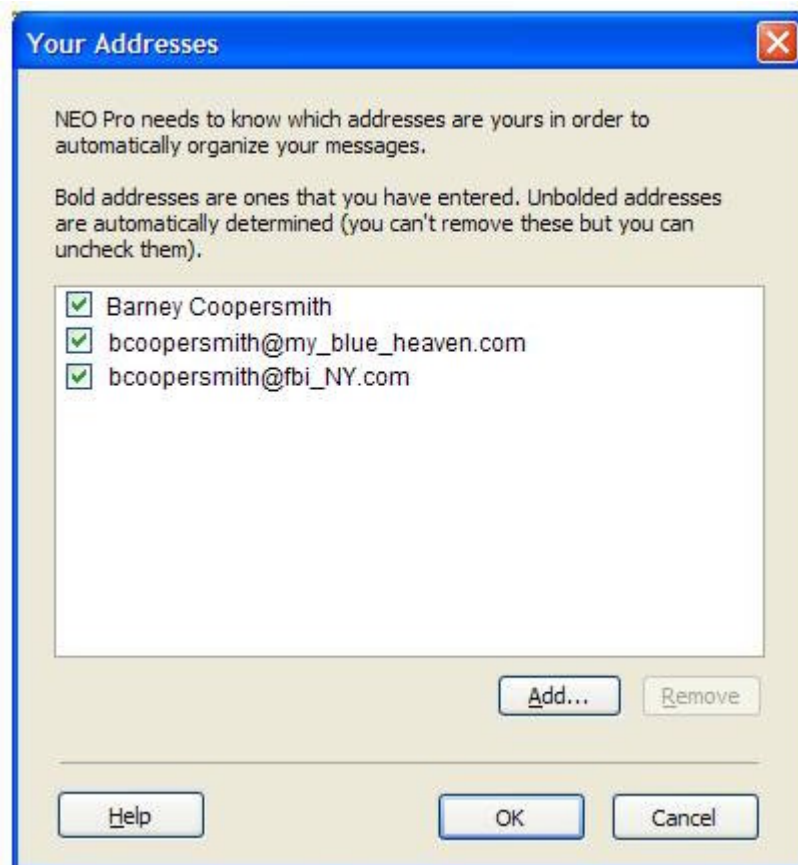
NEO automatically detects your addresses when you create a catalog, and you can add to the list NEO auto-detects. Addresses you enter are displayed in bold.

**Important Note:** NEO does not auto-detect addresses you use after creating the catalog. You have to enter these manually.

### Adding and removing addresses

You can add addresses and you can remove addresses you add. Addresses NEO auto-detects can not be removed - however, you can choose not to include them by unchecking them)

Click File menu | Your Addresses:



To add an address, click the Add command. POP3 email addresses are entered in the usual way (e.g, bcoopersmith@fbi\_NY.com). Exchange Server addresses are enter in X.500 format.

## Working with Correspondent Folders

---

### Keeping name folder information up to date

As you correspond with new people, new Correspondent folders will automatically be created for them and will appear in your New top-level folder. NEO creates the name information for you.

In many cases, however, not enough information is provided and the name folders will simply be email addresses. In other cases, NEO may interpret the name and organization incorrectly.

When a same person is sending emails from two different email addresses, this will result in two different Correspondent Folders for this person. Combining these folders will collect all emails from both email addresses into a single Correspondent Folder. The email addresses associated with a Correspondent Folder can be found by right-clicking the folder and selecting [Folder Properties](#).

### How to update correspondent names

1. Quickly **change a name** in the Folder List by selecting the name and pressing F2. Then edit the name. Alternatively, you can right-click the folder and choose [Folder Properties](#).
2. You can quickly **combine two names** together by dragging one name into another name in the View pane, or you can right-click the folder and choose Combine Folder.

### Combine two names / folders

You will want to combine two names together when someone you correspond with has more than one email address.

When you combine names, you select the name you want to combine and then select the name you want to move it to. The first name disappears, and the second name gets the address(es) from the first name.

#### Combine names using drag and drop

In the View pane, drag the name you want to combine onto the name you want to combine it into.

#### Combine names using the Combine Folders command

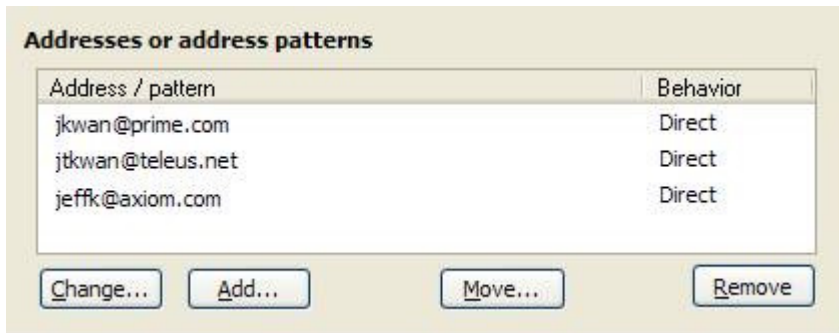
Alternatively, you can right-click the folder you want to combine into another folder, then click **Combine Folders**. You'll then be able to choose the other folder to combine it into.

### Updating address information

The Correspondent folder's addressing information is entered on the [Folder Properties](#) for the folder. To get there, right-click the folder and choose **Folder Properties** (or double-click the folder).



Addressing for the folder is entered in the following section of the Folder Properties.



### Adding and changing address information

Click **Add** or **Change**. You can add as many addresses as you like. The same address can be in more than one folder.

### Moving an address to another folder

Move an address out of a folder to another folder by highlighting the address or address pattern clicking Move.

Your Folder List will appear. On it you can move to an existing folder in the Folder List by highlighting it and clicking OK, or you can add a new folder by clicking the New command at the bottom.

### Removing an address

Highlight the address or address pattern you want to remove and click **Remove**. Remove never removes or deletes messages. It just removes the address from the current folder. The messages related to the address will then be auto-organized again by NEO and will appear in a separate Correspondent folder.

## Entering Email Addresses and Names

### Entering an address

Enter SMTP addresses (e.g., jkwan@prime.com) or X.500 addresses. If entering X.500 addresses, it's easiest to use the **Lookup User** command. Exchange addresses are normally displayed using the address name and is often underlined.

### Entering an address pattern

You can enter address patterns for SMTP addresses. A pattern may contain any combination of the wildcard characters \* or ?. A \* will match any number of characters and a ? will match any single character.

Patterns apply to the part of the address before the @ symbol (they don't apply to the domain portion). Patterns can also apply to address names (with a Name= prefix).

Example patterns:

\*@caelo.com

Represents all addresses with a domain of caelo.com such as support@caelo.com, affiliate@caelo.com and so on.



|                               |   |
|-------------------------------|---|
| jk*@prime.com                 | Represents addresses starting with <b>jk</b> at the <b>prime.com</b> domain: <b>jk@prime.com</b> and <b>jkwan@prime.com</b> .   |
| jk?@prime.com                 | Represents addresses starting with <b>jk</b> at the <b>prime.com</b> domain with exactly 3 characters before the @ sign: <b>jk1@prime.com</b> and <b>jk2@prime.com</b> but not <b>jtkkwan@prime.com</b> . |
| CNET_#@newsletters.online.com | Ideal for capturing emails that change each time: <b>CNET_#3.106@newsletters.online.com</b> , <b>CNET_#3.503@newsletters.online.com</b> , and <b>CNET_#3.618@newsletters.online.com</b>                   |
| Name=Outlook*@online.com      | Represents all address <b>names</b> beginning with Outlook at the online.com domain: <b>Outlook-Users@online.com</b> , <b>Outlook-Developers@online.com</b> and <b>Outlook-Administrators@online.com</b>  |

## Renaming Correspondent Folders

### Renaming a name folder

Right-click the folder you want to rename and choose **Rename Folder** (F2). Enter the new name. Names are automatically formatted according to the name format you have specified in the Format options.

# Attachments

## Overview - Attachments

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If attachments exist for a message, a paperclip will appear in the attachment column of the message list pane, and a paperclip will appear on the right side of the message preview header.

## Attachment security

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Email attachments can contain programs or other executable objects. If the attachment happens to be a computer virus then opening the attachment, either within the message or later when you have saved it, can cause serious harm to your computer. Viruses can also harm the computers of your correspondents if you spread it by sending them a message, or even simply by having them in your address book.

To help reduce the spread of viruses, security measures are available to you. The attachment behavior in NEO mimics the behavior in Microsoft Outlook.

**Important:** NEO does not scan for, identify or protect you from viruses. Only what types of attachments are permitted for opening and/or saving is controlled.

### **Be sure to exercise caution when dealing with attachments.**

The type of security available in NEO depends on the security you have installed in Outlook. In June 2000, Microsoft made available an optional update called the E-mail Security Update. The security update provides for much stricter attachment control than previously.

### **Microsoft E-mail Security Update installed**

NEO exactly mimics the behavior of the Microsoft update. To modify your settings in NEO, consult your Outlook documentation and make the changes in Outlook. NEO will observe those settings.

### **Microsoft E-mail Security Update NOT installed**

Certain file types may be saved to disk only. Other file types may be opened or saved to disk. In NEO, the list of file types that can be saved to disk only is the same as the list used in Outlook. However, the NEO list can be modified in the registry.

### **Changing the save-to-disk only list**

Note that you should not make changes in the registry unless you are very confident in what you are doing. The registry setting to change is:

**NEO Find:** HKEY\_CURRENT\_USER\SOFTWARE\CAELO SOFTWARE\NEO  
FIND\1.0\OPTIONS\ALERTTEXTENSIONLIST

Simply add or remove from the list, being sure to preserve the format.

## Alternative for confirmation prompts for a file type

When you save or open certain types of files, you can uncheck a box that says "Always ask before opening or saving this type of file." If you do, it will subsequently automatically open or save the attachment when you click the attachment name from the icon. However, when clicking the paperclip icon, NEO now also shows a "Save Attachment" icon below the file name to allow the user a choice to save the attachment.

## Re-enabling confirmation prompts for a file type

When you save or open certain types of files, you can uncheck a box that says "Always ask before opening or saving this type of file." If you do, it will subsequently automatically open or save the attachment when you select it.

You can re-enable prompting again for one or more file types by editing the following registry entry:

**NEO Find:** HKEY\_CURRENT\_USER\SOFTWARE\CAELO SOFTWARE\NEO  
FIND\1.0\OPENATTACH

Simply remove the entry(s) associated with the extension of the file type in question (e.g., remove DOC entries to re-enable prompting for Word DOC attachments).

## Opening attachments

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To open an attachment, click on the paperclip at the right of the message preview header. If the entry is grayed-out (disabled), attachment security has prevented you from accessing it.

Choose **Open it**.

To help prevent computer viruses, certain types of files may not be opened. To open these types of attachments, save them to disk and open them there, after you have ensured they do not contain viruses.

## Saving attachments

---

To save an attachment, click on the paperclip at the right of the message preview header.

Choose Save to disk. With multiple attachments, the option to Save All Attachments is available to save them all at once to disk.

You may open saved attachments after you have ensured they do not contain viruses.

## Removing attachments

---

If you delete a message that contains an attachment, all the objects attached to the message are also deleted.

To remove an attachment from a message (and keep the message), follow the following steps:

1. Open the message in the message editor (double-click the message or enter Ctrl+O).
2. Select the attachment(s) you want to remove.
3. Right-click and choose remove.

Note that when you remove attachments in this way, they are permanently removed (they do not go to the Deleted Items folder).

# Searching

## Searching


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### Entering search words and phrases

Unlike Outlook that searches for word strings, NEO searches for whole words.

For example, in Outlook entering “ever” returns messages with “ever”, “every” and “Everest” in them. Whereas in NEO entering “ever” returns messages with “ever” (or “Ever”) in them. If you want to get variants of “ever” you would enter “ever\*” (add wildcard “\*” behind the search word).

### Easiest way to start a search

- From anywhere in NEO, run a new search by clicking  **New Search** on the Standard toolbar (or press F8).
- From within Search view, click **Clear** (or press Esc). It's a **good idea** to get in the habit of clicking Clear before each new search because it resets all parameters and puts you in the text field. Please note that “Match Similar Words” is a sticky option which is not reset when clicking Clear,

Then simply enter a word or words into the white field at the top of the Search view, then click **Go** (or press Enter).

## Entering search parameters

**Update Word Index**  
Manually update the word index. See Tools menu | Options | General tab to set automatically update options.

**Words to search**  
In NEO, **words** are searched for. You can also enter word patterns such as **ever\***. See 'How to enter words to search' for more info.

**Clear search**  
Or press Esc.

**Perform search**  
Or press Enter.

**Save Search**  
Saves current search as a Search Folder.

**Folder:** All folders

**Search Folders**  
Click to choose a folder to search in.

**In:**  Subject  Body  Names/addresses

**Areas search operates**

**Date:**  All  Recent

**Match:**  Similar words

**Match similar words**  
For example, color and colour.

**How long to search**  
All dates or Recent (past year).

**Search folders can be made Hot**

**Search Folders**  
Current Search Results are always saved to the folder that is highlighted when the search is run.  
For new searches, choose Current Search Results. Other folders are created when you click Save Search. Highlight them when you want to edit search parameters.

The screenshot shows a search dialog box with the following fields and options:  
- Search text: budget  
- Clear button  
- Go button  
- Folder: All folders  
- In:  Subject,  Body,  Names/addresses  
- Date:  All,  Recent  
- Match:  Similar words  
- Search Folders list:  
 - Current Search Results (highlighted)  
 - Economists at work  
 - Help with Roaming setup wi...  
 - Info Background Color is to...  
 - NEO Pro update  
 - Outlook 2003 Enlarge Text  
 - Peggy-Sue's wedding  
 - Saved search design

## How to enter words to search

Search finds all messages containing the **words** you provide. A message is selected if your provided words are found anywhere in the message **subject**, **message body**, or **address information**.

### Search expressions and examples

- Unless you direct otherwise, if you enter more than one word, messages are found that contain any of the words.

**Ex:** red green blue (same as entering red or green or blue)

- Whole words are searched for.  
**Ex:** `handle` will find handle but not handlebar
- Use the wildcard character \* to search for words ending in an unknown sequence.  
**Ex:** `handle*` will find handle and handlebar
- Use quotes to locate exact phrases  
**Ex:** `"in that case"` finds messages where words are exactly as shown.
- Searches are case-insensitive - it's easier to enter as lower case.  
**Ex:** `monday` will find monday and Monday
- The words and, or, not and near can be entered, and parenthesis can be entered to control order of execution.  
**Ex:** `(car or bus) near accident` finds messages containing car or bus if either word is within ten words of the word accident  
**Ex:** `car or (auto not bus)` finds messages containing car and messages containing auto that don't contain bus.
- Punctuation is replaced by blanks before the search (except for \*).  
**Ex:** `Standard&Pooors` is the same as entering Standard Pooors.

## About word indexing

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Searches are fast because NEO creates and uses a separate listing (index) of all the words in all messages to speed up lookups.

Word indexing takes place in two places: in the background or by updating the word index manually.

### Automatic background word indexing

NEO indexes all your messages regularly according to a time frequency in minutes you specify. See Tools menu | Options | General tab to see how to set how often you want background indexing to occur.

### Manually updating the word index

Since your word index may be slightly out of date while between background indexes, you can force an update of the word index from Tools | Update Word Index or by clicking the update word index icon  in the Search parameters.

In practice, it's quite rare that you will need to search for messages that you have just received, so it's probably not worth forcing a manual update unless you are looking for a very recent message.

## Saving Searches

---

Normally when you run a search the results appear in the Current Search Results folder, replacing the results of your previous run. This is the most common use of search - simply searching to quickly locate a message you need once.


If you have a recurring use for search results, you can save the search parameters and results in its own folder.

## About Search Folders

- Both the parameters and the results are saved.
- The results remain the same until you refresh them (they're static). To refresh the results to include recent messages, right-click the folder and choose **Refresh Search**.
- When you run a search, the results and parameters you enter always **replace the currently selected Search Folder**. Most often this is Current Search Results, but if it is a differed search folder the parameters and results will replace it.

## Working with Search Folders

### Saving a Search

- Run a search: click Clear, enter words to search, then click Go.
- Click the Save Search command .
- Optionally, rename the search folder (see next section).

### Renaming a Search Folder

- Right-click the folder and choose Rename Folder (or press F2).

### Refreshing a Search Folder

- If you simply want to **update the results**, right-click the folder and choose Refresh Folder.
- If you want to **edit the parameters**, select the search folder, change the values, run the search, then click the Save Search command.

### Removing a Search Folder

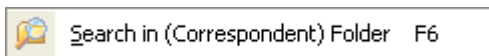
- To **Remove** a search folder, right-click the folder and choose Remove Folder (or press Alt+Del). Your messages will **not** be removed.

## Searching in a Folder

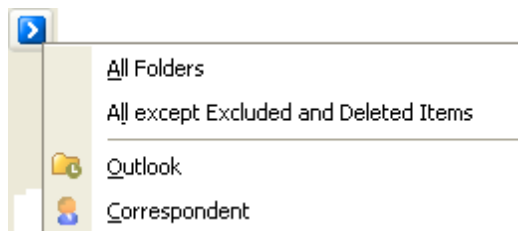
---

You can **Search within a (Correspondent) Folder** in two ways:

1. Right-click any NEO or Outlook folder and choose Search in Folder (or click F6):



2. Choose the Search view Folder menu. When you click a view listed you will be able to choose a folder within it.

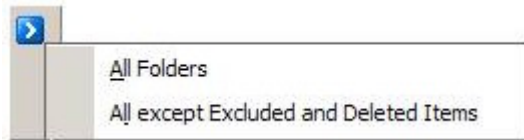




## Excluding Excluded and Deleted Items in Search

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In Search view you can choose to search All Folders, any selected folder or choose to search All Folders except Excluded and Deleted Items.



The choice you make remains in effect until you change it. To clear your other search parameters, click **Clear**.

## Why saved searches are useful

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Suppose you are budget responsible for your department and are working for 3 months to finalize budgets for next year. All messages related to this project contain the words Budget FY06.

You could create a search with words to search: **“budget FY06”**. If you saved that search result, as “Budget FY06”, you could rerun the search whenever you wanted by clicking Refresh Search (right-click the Search Folder). Your search results would then be updated to include all new messages since the last time you ran the search. When finished with the project, you can simply remove this folder (Alt+Del) while all your messages remain within Outlook.

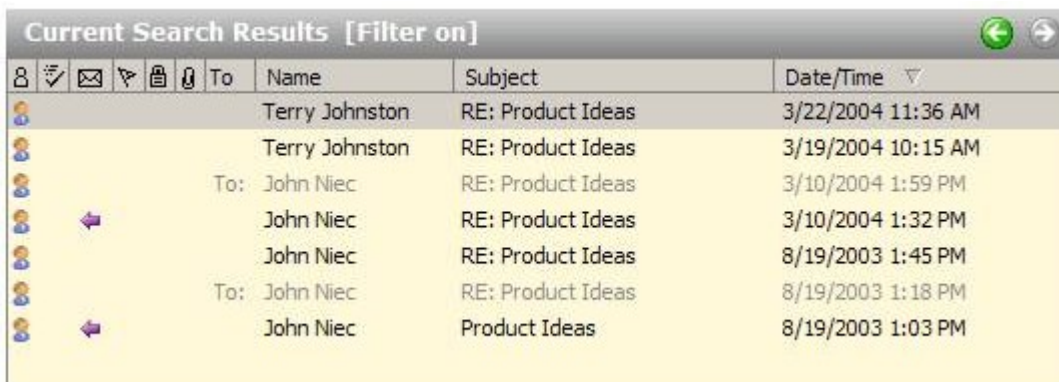
## Search on Conversation

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To quickly see all related messages:

- Click  Search for Conversation on the Standard toolbar, or
- Press F7.

All messages based on the same 'conversation' will be displayed.

A screenshot of the Outlook search results window. The window title is 'Current Search Results [Filter on]'. It shows a list of search results with columns for 'To', 'Name', 'Subject', and 'Date/Time'. The results are grouped into conversations, indicated by purple arrows pointing to the left. The first conversation starts with a message from Terry Johnston on 3/22/2004, followed by a reply from Terry Johnston on 3/19/2004. The second conversation starts with a message from John Niec on 3/10/2004, followed by a reply from John Niec on 3/10/2004. The third conversation starts with a message from John Niec on 8/19/2003, followed by a reply from John Niec on 8/19/2003. The fourth conversation starts with a message from John Niec on 8/19/2003, followed by a reply from John Niec on 8/19/2003.

| To            | Name           | Subject           | Date/Time          |
|---------------|----------------|-------------------|--------------------|
|               | Terry Johnston | RE: Product Ideas | 3/22/2004 11:36 AM |
|               | Terry Johnston | RE: Product Ideas | 3/19/2004 10:15 AM |
| To: John Niec | John Niec      | RE: Product Ideas | 3/10/2004 1:59 PM  |
|               | John Niec      | RE: Product Ideas | 3/10/2004 1:32 PM  |
|               | John Niec      | RE: Product Ideas | 8/19/2003 1:45 PM  |
| To: John Niec | John Niec      | RE: Product Ideas | 8/19/2003 1:18 PM  |
|               | John Niec      | Product Ideas     | 8/19/2003 1:03 PM  |

When done, click  or press **Alt+LeftArrow** to go back to the folder you came from.

## About 'Conversation'

Every message has a property called Conversation, and it is usually the same as the Subject property but it can be different.

When a new message is created, the current Subject is copied to the message's Conversation. However, when the Subject is edited, the two will be different. Conversation always remains as the original Subject.

# Junk Mail - Spam

## Excluding Spam Folders from NEO

---

Many people use programs to automatically detect and isolate spam (junk mail) into one or more Outlook folders. Later versions of Outlook have this feature built in, and many third party programs have more extensive capabilities.

NEO supports these programs by allowing you to exclude messages going into these spam folders from NEO folders. The excluded messages are still viewable in your Outlook folders (via NEO's Outlook view) - they just aren't included in NEO's Correspondent Folders.

### How to exclude folders from NEO

You can exclude any Outlook user folder that you define. In fact, it isn't restricted to spam folders. You may want to choose to exclude other user-defined folders too.

- Right-click the folder in NEO Outlook view and choose Folder properties,
- Check the "Folder is not organized into NEO folders" checkbox

### How it works

- When a message is moved into your designated spam folder, the message is excluded from NEO. If it is moved out of your spam folder, it becomes included in NEO.
- This happens whether your program automatically handles the message or you handle it manually.
- Excluding starts from the time in which you add the folder to the list in NEO, and stops when you remove it. Therefore it may be that your designated folder has some messages that are excluded and some that are included. We recommend that you empty the spam folder before adding it to the NEO list.

# Synchronizing with Outlook

## About Synchronizing with Outlook

---

NEO normally displays all the messages in your message store(s). However, when NEO is not running NEO doesn't know about new, changed or deleted messages that are processed.

### How it works ... in a nutshell

If NEO is running when new messages arrive, are changed or deleted, then you'll always see all your messages in NEO (NEO keeps you synchronized on-the-fly even when hidden in the System Tray).

If NEO is not running, then NEO will not know about these message events and will need to get synchronized again – therefore it is advised to configure NEO to Fast Synchronize on startup (Tools | Options).

## How to stay synchronized

---

It helps to understand synchronization because it can affect what messages you see in NEO.

### Recommended way to stay synchronized

We recommend all users enable the option Fast Synchronize on Startup. It syncs quickly and runs in the background so that it won't get in the way of getting going with NEO. You set this option on the Tools | Options menu. Fast sync (on startup) will ensure NEO is updated with new, changed (filed) and deleted messages while you are using Outlook.

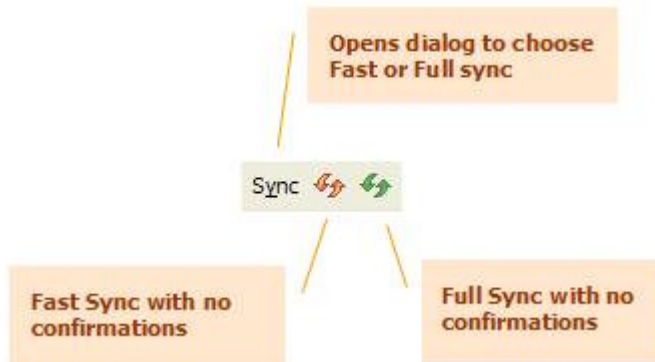
Full sync will be needed when you delete messages when NEO is not running. You'll know this because you'll see a message in NEO that is listed but whose contents can't be displayed..

In summary, if you keep NEO running while using Outlook and you Fast Sync on startup, you'll always stay in sync.

## How to synchronize manually

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On the toolbar are three buttons for manually synchronizing:



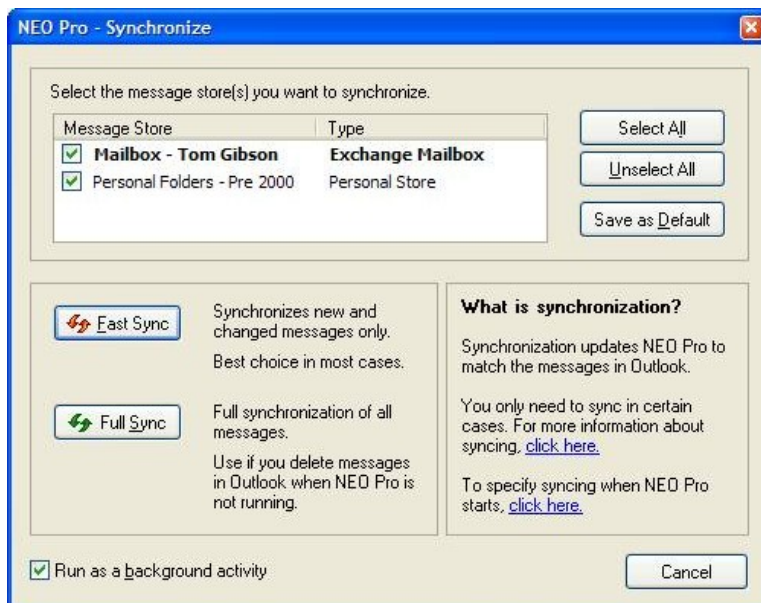
In the lower-right status bar progress of the synchronization is shown. From there you can also cancel it at any time.

## Choosing message stores to keep synchronized

Click **Sync** on the standard toolbar to control how you want to synchronize (Fast sync or Full sync), and to choose what message stores you want to synchronize.

The messages stores checked at the top of the dialog are the ones that are synchronized when you perform a Full or Fast sync. You may want to consider not synchronizing older messages stores that you only use for reference purposes and are not changing in content anymore.

Messages for message stores you choose not the synchronize will still remain in your catalog - they just won't be updated if the messages are edited or deleted, or new messages are put into them.



# Catalogs

## Catalog Overview

---

NEO works by creating indexes to your messages and storing them in a separate database called the catalog. Your messages are not stored in the catalog, just references to them.

Whenever messages are sent, received or updated in a message store, NEO automatically updates the indexes in the catalog.

### Your first catalog

A catalog is created by a Catalog Setup wizard when you start NEO for the first time, and whenever NEO is opened with a new mail profile. The catalog is created in several steps. The more messages you have the longer it will take to create your catalog, however catalog creation is only performed once.

All your message stores can be included in NEO's catalog to provide a seamless organization of all your messages independent of their location within Outlook. Also IMAP message stores can be added.

### Multiple catalogs

Users can have more than one catalog. It is even possible to open multiple copies of NEO using different catalogs.

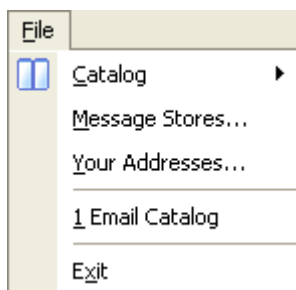
All messages from all messages stores in a catalog are unified - that is, organized together in the same Correspondent folder and in results of a Search. If you want to keep message stores separate then you can create separate catalogs for them.

## Catalog Basics

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### Opening and Closing a Catalog

Open and close catalogs using the File menu:

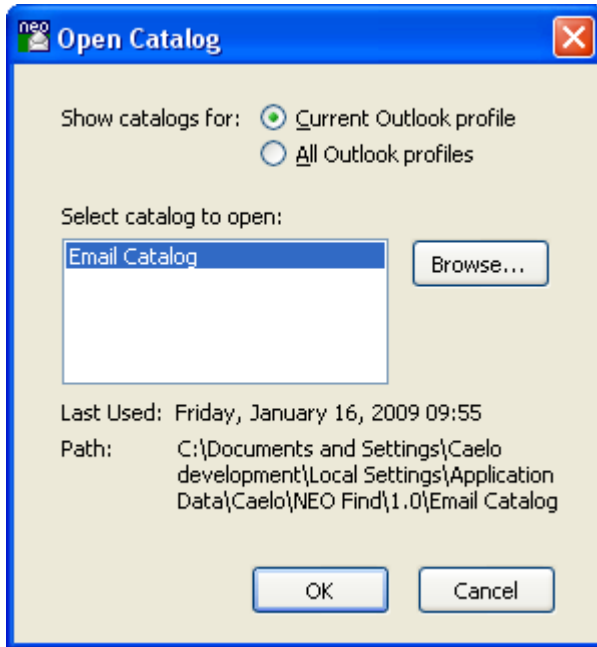


### Opening a catalog

You can:

1. Pick from the most recent used list.

2. Click Catalog then click Open Catalog:



When the dialog opens you see the catalogs you have created for your current mail profile. You can choose to open up a catalog from another profile by selecting the option at the top.

### Automatic catalog opening

By default, the last catalog you opened is automatically opened for you next time you start NEO. If you don't want automatic opening to occur, you can:

1. Disable the option. See Tools menu | Options General tab.
2. Override the automatic open option by pressing the Shift key when clicking your NEO or NEO Pro desktop shortcut (keep Shift down until NEO is fully open).

### Closing a catalog

You can:

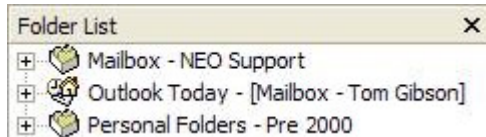
1. Choose Close Catalog from the File menu.
2. Open a different catalog.

## Your Message Stores

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### Message stores defined

Message stores are repositories of messages and Outlook items. In Outlook, they are in your Folder List and look like this (in collapsed mode):



In NEO these same message stores appear in the NEO's Outlook view. There are five message stores types that NEO organizes:

**Exchange Mailbox**

If you use Exchange Server, this is typically where your messages are delivered. This message store is your Mailbox which is where your email data is stored on your company's server computer.

**Exchange Delegate Mailbox**

You can delegate access of your Exchange Mailbox to others. When you do, it appears in their Folder List just as though it is theirs. This message store is located on your company's server.

**Personal Folder (PST)**

Sometimes known as PSTs, Personal Folders, or Data Files, these are typically stored on your own computer. You create these in Outlook to improve Outlook performance.

**Offline Folder (OST)**

These are special Exchange user variants of Exchange Mailboxes that contain messages you have designated to synchronize for offline use. These are automatically handled by NEO when you are in offline mode. Cached Exchange Mode in Outlook 2003 and later makes extensive use of Offline Folder files.

**IMAP folders**

When adding an IMAP email account (such as Gmail) to your Outlook system, you will find the online IMAP folders in your Outlook Folder list. These can be organized in your NEO catalog.

**Moving or closing your Outlook message store (Personal Folder, PST)**

If you move an Outlook message store that is organized in NEO, Outlook changes its internal identifier. When you next start NEO, NEO will then not be able to find it. To make it visible within NEO again you will need to remove it and re-add it (see next section).

If you close an Outlook message store in Outlook you will need to remove it from NEO too (again, see next section).

**Adding and removing message stores**

You can only add message stores that are in your current mail profile.

**Note:** If you change the message stores that are in your Outlook profile, you must restart NEO (the message stores available to NEO are only determined when NEO starts).

You explicitly add or remove messages stores via Catalog Properties by clicking File menu | Message Stores, or when you create a catalog.

Here is the how you choose catalogs when creating a catalog:





Check the message stores you want included, and uncheck those not to include in NEO. You can add or remove message stores from your catalog at any time.

You don't need to add/remove offline message stores explicitly. When you go offline in Outlook, with or without Cached Exchange Mode, NEO will automatically organize your offline store.

You can choose from message stores in your mail profile. If you want to include message stores not in your profile, you must add them to your profile first.

### Set a time limit for older messages in the Catalog

You can keep older messages out of NEO's catalog by setting a time limit within the Miscellaneous tab under View | Options.



Messages older than the selected date will be excluded from NEO's catalog independent how or where they are organized within the Outlook system.

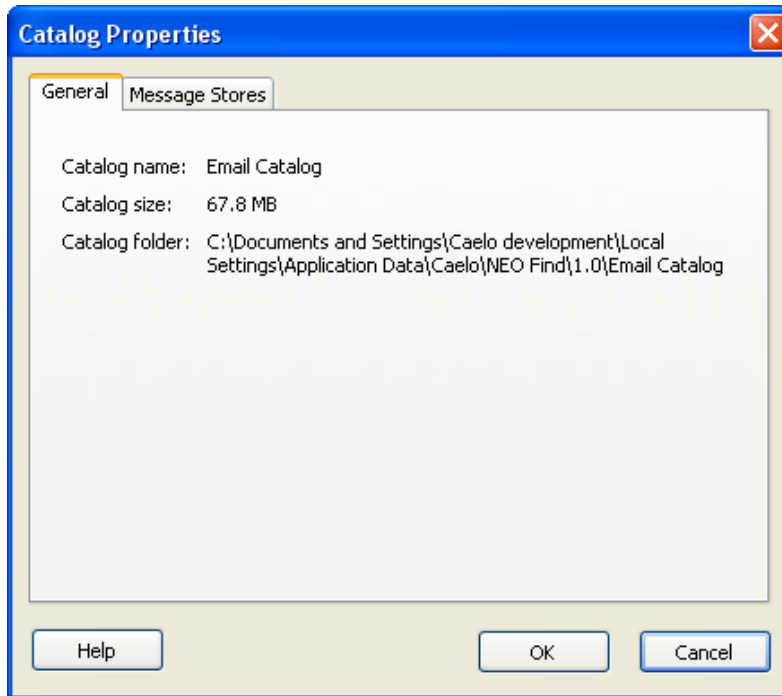
Changing this date will force a full synchronization and update of the word index.

## Catalog Properties

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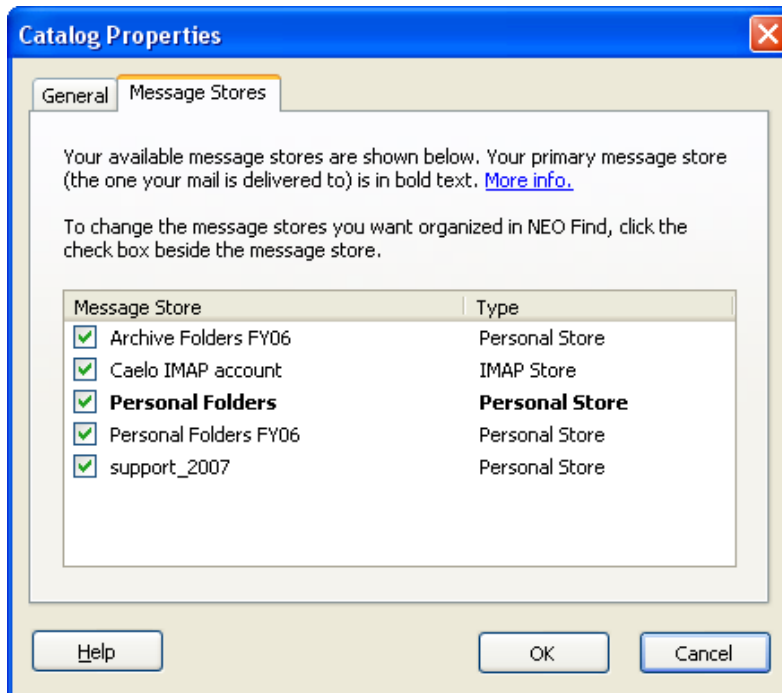
Use Catalog Properties to review information about a catalog, and to add/remove message stores from a catalog.

## General tab



Shows the name, size and location (folder the catalog files are stored in). The name of a catalog can be different than the location folder name.

## Message Stores tab



Message stores that are delegated into another Exchange Server's Mailbox must be alone in their own catalog.

## Creating and Deleting Catalogs

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### Creating a New Catalog

You create catalogs using the New Catalog wizard. Click File menu | Catalogs | New Catalog to start it. The New Catalog wizard also starts automatically the first time you run NEO, or when you open a mail profile that you haven't yet created a catalog for.

The New Catalog wizard consists of six easy steps. You can cancel or go back and edit your settings at any time - catalog creation doesn't start until the final step.

- |  |  |
|--|--|
| <b>Step 1</b><br>Choose a name               | The name must be unique across your catalogs. Default name for 1 <sup>st</sup> catalog is "Email Catalog".   |
| <b>Step 2</b><br>Choose location             | <p>The default location for your catalog is the same general area of your Application Data into which your Outlook personal folders are stored. You can put it wherever you like but it should be in a location where there is lots of disk space available.</p> <p>You can choose a network drive but keep in mind that your performance will be affected if on a slow drive. It's fastest to store it on your local computer. Note that by default, like Outlook, the catalog is stored in the non-roaming section of your computer.</p> |
| <b>Step 3</b><br>Select your message stores  | <p>Users can include more than one message store in a catalog.</p> <p>Normally you would select all message stores for a seamless organization of all your messages.</p>   |
| <b>Step 4</b><br>Identify your spam folders  | <p>Identify if you have folders that capture Spam (junk mail). Microsoft Outlook and many spam-detection programs automatically funnel spam-looking messages to Outlook folders.</p> <p>Messages contained in the spam folders you designate are not included in NEO. You can change this at any time within NEO.</p>  |
| <b>Step 5</b><br>Verify your email addresses | NEO needs to know which email addresses are yours. Note that NEO needs to know all your addresses - even ones you don't use any more.  |

**Step 6**  
Start  
synchronization

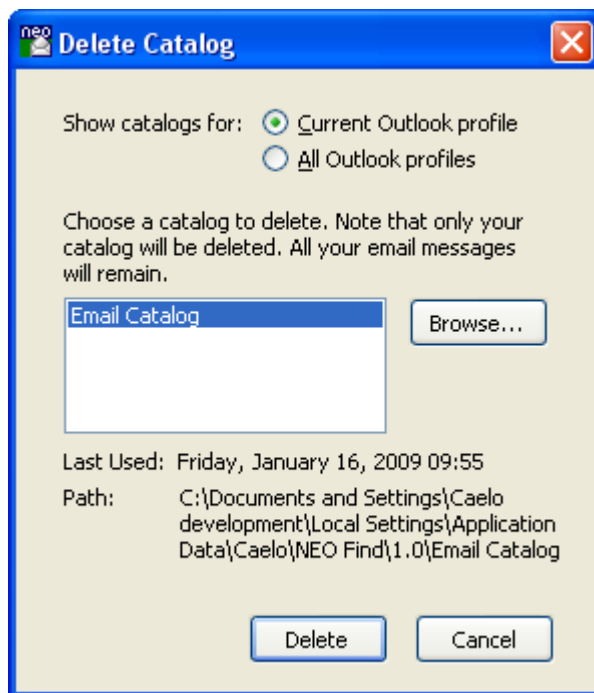
NEO attempts to determine your addresses automatically. Add to or remove from this list.

Now that all the information is collected, click Next to start the synchronization process. A progress dialog will appear.

## Deleting a Catalog

When you delete a catalog only the NEO information is deleted. Your messages will remain.

1. Click File menu | Catalog | Delete Catalog.
2. Choose catalog to delete. You can select a catalog from your current profile or all profiles. If you do not see your catalog in any profiles, click Browse to locate it.



## Catalog Maintenance

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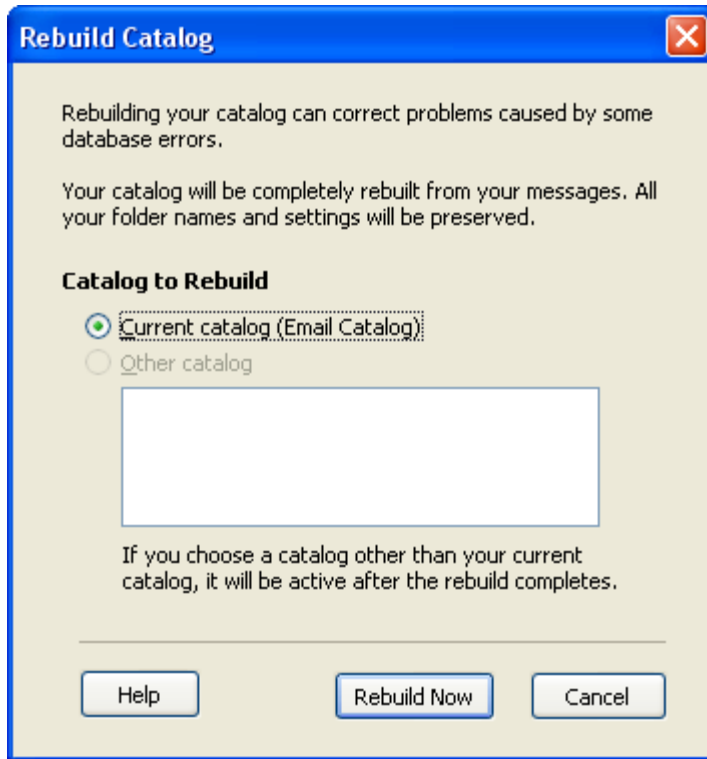
### Rebuilding a Catalog

Sometimes it's necessary to rebuild your catalog, for example when one of your database records gets corrupted after a power failure. Note that you should always shut NEO down normally to help prevent errors such as these.

It is normally not necessary to rebuild your catalog to improve performance. You should only need to do it when advised to.

The rebuild process completely rebuilds your catalog from your messages. All your folder names and settings will be preserved. Rebuilding your catalog can take almost as long as it took to create your catalog in the first place.

You can choose to build the current catalog or choose another catalog.



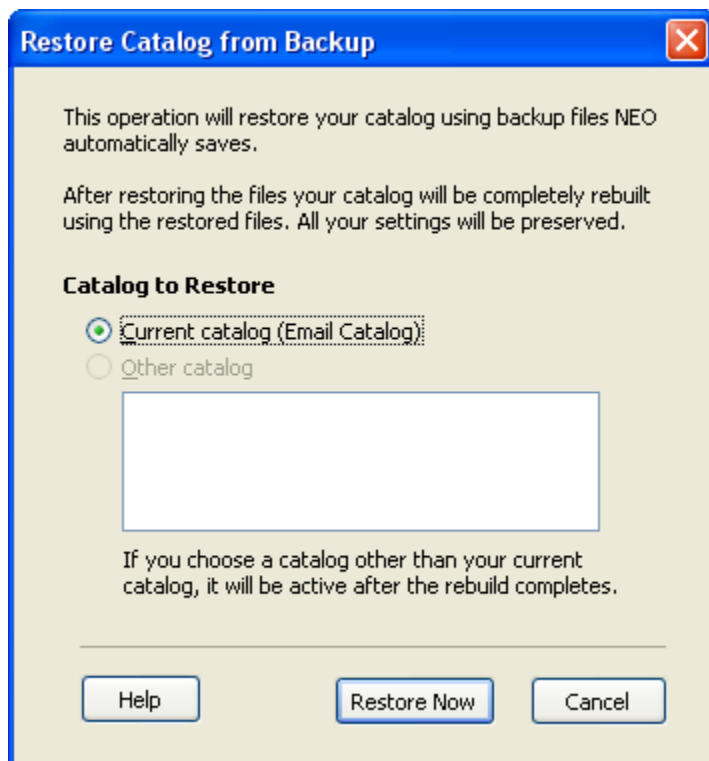
## Restoring a Catalog from Backup

You can use the Restore from Backup feature to overcome a data problem with your catalog.

As a safety precaution, NEO backs up critical catalog files to a folder called Backup in your catalog folder. The Restore from Backup feature uses these critical files to completely rebuild your catalog from the saved files.

To restore your data:

1. Click File menu | Catalog | Restore from Backup.
2. Choose catalog to restore.



## Backing up and restoring the catalog

The catalog contains information about your messages and your Correspondent folders. Even though you could always recreate your catalog from scratch if it got corrupted, you would lose the customizations you have made.

### NEO automatically backs up key data files

At least every three days NEO backs up key data files to a folder called Backup in your catalog folder. From these key files, your catalog can be completely rebuilt without any information loss.

You can use Restore from Backup (File menu | Catalogs menu) to restore and rebuild your catalog. It will automatically use these previously saved files.

### Backing up the catalog manually

While the above offers some protection in restoring to correct data corruptions, it offers no protection against accidental deletions, hardware failures, and the like.

You may wish to back up the catalog manually to an external location. You can choose to simply back up the key data files from your catalog folder(s), or you can choose to back up all the files from your catalog folders. If you choose just the key data files you will need to also then perform a catalog rebuild operation after restored, whereas if you back up all the files in your catalog a catalog rebuild is not necessary.

There are three key files to back up. The current versions exist in your catalog folder, and older backup versions exist in the Backup subfolder. The files are:

- CatalogConfig.xml

- NAD.dat
- NFL.dat

### **Restoring the catalog from a manual backup**

1. Close NEO.
2. Restore the files you backed up to your NEO catalog location.
3. If you restored just the two key data files, you must also do a catalog rebuild.

### **Locating and moving the catalog**

#### **Where the catalog is stored**

The catalog is automatically created for you and stored in a folder of your choosing. To find where the current catalog is stored, view the catalog properties. Click File menu | Catalog | Catalog Properties.

A quick way to locate where your default catalog location is to start creating a new catalog (click File menu | Catalog | New Catalog) then click through the first panel and you will see the default location. You can also browse from there. You can click Cancel to stop the New Catalog wizard.

To find all your catalogs on your computer, you could also do a Windows Search and search for all occurrences of file **CatalogConfig.xml**.

#### **Moving the catalog**

There is no command within NEO to move the catalog. However, if you wish to move it you can do so using these steps:

1. Close NEO.
2. Locate the catalog you want to move (see above).
3. Move the entire catalog folder and subfolders to your new location (it must not exist in the original location – if you copy it, delete it from the original location).
4. Start NEO. You will be notified that the catalog files are missing.
5. Click File menu | Catalogs | Open Catalog. Select the catalog you want to open in the list then click Browse. Browse to your new location and select the file **CatalogConfig.xml**.

# Buying, Registering, Updating, Uninstalling

## How to buy NEO Find

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All information about purchasing NEO Find is contained in our online store.

<http://www.emailorganizer.com/store/index.php>

## How to register your license

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### Your license

Registering your license simply means entering your License Code and License Key into NEO so that we can enable your product for permanent use. We don't collect any personal information other than the code and key (unless you provide it to us in our opt-in form).

When you first start NEO Find we automatically issue an Evaluation License to you that is valid for the evaluation period. When the evaluation period is over you won't be able to continue to use NEO Find until you receive a permanent License.

When you purchase NEO Find you will be sent an email containing your License Code and a License Key. These two components work together. If you change any part of either one, you won't be registered.

### Entering your license information

1. Click **License** on the **Help menu**.
2. Enter your **License Code** and **License Key** exactly as provided to you, including upper and lower case. You may find it easiest to copy and paste it from the email we sent you.
3. Click **Activate**. If invalid, check the email message you received it on and try it again.

Important: NEO licenses are valid for minor version upgrades only (1.1, 1.2, ...). For a major version upgrade (from 1.x to 2.x) the license can be upgraded – for licensed users we will provide reduced upgrade pricing. Click "Get Evaluation License" to try a new major version free during the evaluation period.

4. Click **OK**.

Please Note: Individual licenses can only be activated on a single system. Site Licenses can be activated for the number of computers the license was issued for (e.g. a site license with 100 seats can be activated on 100 systems).

### Transferring your license to another computer

Before you can use your license on another computer, the license first needs to be deactivated on the initial system:

1. On the original system click **License** on the **Help menu**.
2. Click **Deactivate**. Note your license code and key to transfer to your other system.
3. On the other system, repeat the initial steps of entering license information as outlined above.



Failing to deactivate the license as described here will invalidate the license in which case a new license needs to be purchased.

## Reinstalling NEO on an existing system

The license activation process links the license to a unique, encrypted hardware hash of the system in use. Reloading the entire software (or even reformatting the drive) is not affecting license activation when NEO Find is reinstalled. Also the activation process is designed to handle routine hardware upgrades on the same system.

## Checking for product updates

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NEO will automatically check for product updates when you start NEO if you have the option checked on the Tools | Options | General tab.

To manually check whether an updated version of NEO is available:

1. Click the **Help** menu.
2. Click **Check for Updates** (online).

This operation compares your version with the latest version available by connecting to our website. You will be told whether or not a new version is available.

## Determining Your NEO Version

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To determine your NEO version:

1. Click the **Help** menu.
2. Clicking About NEO Find.

## Uninstalling NEO

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To uninstall NEO:

1. Click Start, then Control Panel then Add/Remove Programs program.
2. Select NEO Find.
3. Click either Change or Remove (depends on your system). If you clicked Change, then choose Remove when the dialog appears.

PLEASE NOTE: When you intend to use your license on another machine, please **FIRST** deactivate your license from Help | License **BEFORE** uninstalling.

4. You can choose whether or not to remove your catalog data. If you believe you will not be using NEO again, then choose to remove it.
5. Also, it helps us to know why you are uninstalling NEO. **We'd appreciate it to click the box to give us a reason if prompted.**

# Common Questions

If you don't find the answer to your question here, please click Support (online) on the Help menu. For downloading, installing or licensing questions, see next section.

## Using NEO Find

### **What's the best way to start NEO?**

Enable the option to automatically start NEO when Outlook starts, and start Outlook in your normal way.

### **Does NEO store copies of Outlook messages?**

No. NEO stores indexes (shortcuts) to your Outlook messages. However, if you create a message in NEO the message will appear in your Outlook message folder. Similarly if you delete a message in NEO it will be deleted in Outlook. You can also move messages between Outlook folders from within NEO and the move takes place within Outlook.

### **Does NEO work with all parts of Outlook?**

NEO only organizes your email contained within Outlook Please note that NEO does not integrate with Outlook's Public Folders (in Exchange).

### **Does NEO work with IMAP message stores included in Outlook?**

Yes, NEO Find can also organize all messages included in the IMAP message store as visible in Outlook.

### **When a message is moved within Outlook it doesn't appear to move within NEO**

Messages in NEO appear in more than one place at the same time, and the folders are created automatically for you. These NEO folders are virtual folders showing your messages independent of their location within Outlook. When a message is moved within Outlook, it will still appear under the same Correspondent Folder – in NEO's preview pane the folder location can be seen which shows the updated information.

### **How do I exclude Spam/Junk Folder messages from showing in NEO?**

You can designate Outlook folders to be excluded from NEO's Correspondent folders. You choose your spam folders when you create a catalog, but you can also specify that setting as a Folder Property for any Outlook user-defined folder (right-click the folder and choose Folder Properties).

### **Search didn't find a message it should have**

The most likely reason is that it was a very recent message. Like the web, NEO makes searches fast by indexing words in the messages. However, it only does this at certain times - the default is every 30 minutes. You can change how often NEO does a word index by going to Tools | Options | General Tab.

### **How do I exclude Deleted Items and Excluded folders from my search?**

In the Search window, click the blue/white arrow next to the Folder box. From the selection screen select "All except Excluded and Deleted Items".

### **How do I hide Sent mail from NEO folders?**

All NEO folders automatically display both sent and received mail. You can use the Direction filters on the Filter toolbar to show Sent, Received or both types of mail.

### **How do I add a message store?**

You can organize more than one message store in your catalog. To add another message store (or change what message stores are included in your current catalog), click File menu | Message Stores. Note that a message store must be in your current profile (i.e., visible in your Outlook Folder List) to be able to add it to your catalog. Also, note that you must restart NEO after adding new messages stores in Outlook so that NEO can see them.

### **How do I copy a message?**

Right-click-drag the message or messages from the List Pane to the folder you want to copy it/them to. When you release the mouse button, you will be given the choice to copy or move.

### **How do I stop connecting to the Internet in the Reading Pane?**

Like Outlook, when an HTML message in the Reading Pane needs an object from the Internet, it automatically goes and gets it (subject to your Connection tab option settings in Internet Explorer). You can prevent NEO from getting those images (regardless of other settings) by setting this option in Tools | Options | Reading Pane tab.

### **What Outlook folder is my message in?**

Look on the Reading Pane header. The Outlook folder where the message is stored in, is labeled Folder.

Or press Ctrl+J (Jump to Folder) to see where a message is organized; from here you can easily jump to the containing Outlook folder.

### **I get a startup message about my default email program**

For some versions of Outlook, NEO requires that Microsoft Outlook be configured as your default email program. NEO detects this and reports it to you each time you start NEO. Ensure "Microsoft Outlook" is your default email program. To change the setting: click Start, point to Settings, click Control Panel, then double-clicking the Internet Options icon. Click the Programs tab, then choose Microsoft Outlook as the E-mail program. Do not choose Outlook Express..

It could be that NEO will work well for you even if you get this message. If NEO does work for you, you can disable the message by adding the following key in your registry.

For NEO Find add this one:

HKEY\_CURRENT\_USER\Software\Caelo\NEO Find\1.0\Options\NoDefaultClientCheck as a Dword value set to 1. This will disable checking on startup. You should be very careful when modifying your registry. If you have any questions, please send an email to support@caelo.com.

### **Why can't I see my attachment?**

If you have the Microsoft E-mail Security Update installed you will not be able to open or save certain file types. Please consult your Microsoft Outlook documentation for more information.

#### **Some messages appear incorrectly addressed to or from me**

Have a look at your addresses. If not all your addresses are in there, your email will not show correctly.

#### **NEO doesn't start properly**

NEO will not start and will report errors if email is improperly configured on your computer.

Some startup problems can also occur because of interaction with other email-aware programs you may be running. We can help solve these conflicts. Please contact us.

#### **How often should I synchronize?**

When you let NEO start together with Outlook and have NEO configured to Fast Sync on startup, there is no need to manually synchronize NEO. You can set both options on Tools | Options.

#### **How does the NEO Sync differ from Outlook Synchronize?**

NEO Sync synchronizes your message store (Exchange mailbox, PST or OST) with the NEO catalog (where NEO stores all of its data).

Outlook Synchronize applies only to Exchange users who have enabled offline access. It synchronizes your Exchange mailbox with your offline message store (OST). It is not related to NEO's synchronize.

#### **How do I back up my NEO data?**

NEO automatically backs up critical files for you, and you can backup those catalog files manually too. See chapter on Catalogs for more information.

#### **How do I report a problem?**

Click 'Send Email to Support' on NEO's Help menu.

### **Downloading, Installing, Licensing ...**

#### **Is the trial version of NEO Find different from the "final" version?**

No. In fact the trial version is the final version. When you purchase NEO Find we send you registration information that you enter into NEO. Simply by entering the registration information, the trial period is removed and you're all set.

#### **Do I have to re-download on purchase?**

No. All you need to do is enter the registration information that we email to you. To enter this information go to Help | License.

#### **How often can I download?**

As often as you like.

#### **What NEO Find upgrades do I get for free?**

If you are an unlicensed user you are entitled to download and try out any version of NEO provided your trial period has not expired.

If you are a licensed user you are entitled to all versions of the same major version level. For example, if you purchased version 1.0, you are entitled to free upgrades for all 1.x versions (e.g. 1.1, 1.2, etc.).

**How do I know I have the latest version?**

Select Help | Check for Updates

**How do I permanently register NEO Find?**

When you purchase NEO you will be sent registration information and instructions on how to register.

**Am I sent the "final" version?**

No we don't send anything except the registration information. The trial version actually is the final version. Simply by entering the registration information, the trial period is removed and you're all set.

**Do I have to re-register when I upgrade NEO?**

You'll automatically stay licensed if you are upgrading the same major version (e.g., 1.0 to 1.1).

If you are upgrading to a new major release (for which we offer an upgrade price), you will need to enter new registration information. For a new major version a new evaluation license can be obtained to freely test the new version before deciding to upgrade.

**Will I stay licensed if I upgrade my computer?**

See "Buying, Registering and Updating" for more information.

**What if I lose my registration information?**

Connect to our support page online and click the link "Resend License Information".

**Is NEO easy to uninstall?**

Yes. Outlook settings are never changed and all your messages are left intact. By the way, Outlook always continues to get messages whether you are using NEO or not. See topic "Uninstalling NEO".

# Reference

## Keyboard shortcuts

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### Find Messages

|        |                                  |
|--------|----------------------------------|
| F5     | Find Correspondent               |
| F6     | Search in (Correspondent) Folder |
| F7     | Search on Conversation           |
| F8     | New Search                       |
| Ctrl+J | Jump to Folder                   |

### Switching Views within NEO

|       |                              |
|-------|------------------------------|
| Alt+C | Switch to Correspondent view |
| Alt+O | Switch to Outlook view       |
| Alt+S | Switch to Search view        |

### Message Actions

|                 |              |
|-----------------|--------------|
| Ctrl+O or Enter | Open Message |
| Ctrl+R          | Reply        |
| Ctrl+Shift+R    | Reply to All |
| Ctrl+F          | Forward      |

### Folder List

|                  |  |
|------------------|--|
| F2               | Rename folder                              |
| Num +            | Expand current folder in Folder List       |
| Num -            | Collapse current folder in Folder List     |
| Ctrl+Shift+Num + | Expand all folders from anywhere in list   |
| Ctrl+Shift+Num - | Collapse all folders from anywhere in list |

### Switching to Outlook

|        |                                    |
|--------|------------------------------------|
| Ctrl+0 | Switch to Outlook current location |
| Ctrl+1 | Switch to Outlook Inbox            |
| Ctrl+2 | Switch to Outlook Calendar         |
| Ctrl+3 | Switch to Outlook Contacts         |
| Ctrl+4 | Switch to Outlook Tasks            |
| Ctrl+5 | Switch to Outlook Notes            |
| Ctrl+8 | Switch to Outlook Journal          |

### Working with the List and Reading Pane

|                         |   |
|-------------------------|---|
| Ctrl + Up or Ctrl +     | Move to previous message                |
| Ctrl + Down or Ctrl +   | Move to next message                    |
| Ctrl+Shift +Alt Up/Down | Scroll List Pane without changing focus |
| Ctrl+Home               | To first message or start of message    |
| Ctrl+End                | To last message or end of message       |
| Ctrl+Alt+Up             | Reading Pane On                         |
| Ctrl+Alt+Down           | Minimize Reading Pane                   |
| Ctrl+Shift+Up           | Increase Reading Pane                   |
| Ctrl+Shift+Down         | Decrease Reading Pane                   |
| Ctrl+Shift+PageUp       | Maximize Reading Pane                   |
| Ctrl+Shift+PageDown     | Restore Reading Pane                    |

### Launching weblinks

|                  |  |
|------------------|--|
| Click link       | Launch weblink in current browser window |
| Shift+Click link | Launch weblink in new browser window     |




























### Actions generally available anywhere

|                       |   |
|-----------------------|---|
| F1                    | Help  |
| F3                    | Filter folder names of current view                         |
| Ctrl+L                | Toggle filter on/off  |
| Ctrl+Shift+L          | Clear filter  |
| Tab                   | Cycle panes forward (View, List, Preview)                   |
| Shift+Tab             | Cycle panes backward  |
| Alt+Left              | Back to previous folder                                     |
| Alt+Right             | Forward to next folder                                      |
| Shift+ Start NEO      | Starts NEO without opening a catalog                        |
| Ctrl+Shift+ Start NEO | Starts NEO and resets Workspace and Toolbar back to default |



# Symbols

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## Message status symbols










|   |  |
|---|--|
|    | High Importance (otherwise blank)                                |
|    | Filed to folder other than Inbox or Sent Items (otherwise blank) |
|    | Unread (Read messages show as blank)                             |
|    | Message has been replied to                                      |
|    | Message has been forwarded                                       |
|    | New or draft   |
|    | Waiting to be sent (in Outbox)                                   |
|    | Flagged - Colored (plus 5 other colors)                          |
|    | Flagged - Complete   |
|    | Attachment   |
|    | Sent message (otherwise blank)                                   |
|    | Digitally signed - Valid   |
|    | Digitally signed - Invalid                                       |
|   | Meeting Request - Sent   |
|  | Meeting Request - Declined                                       |
|  | Meeting Request - Accepted                                       |
|  | Meeting Request - Tentatively Accepted                           |
|  | Task Request - Sent  |
|  | Task Request - Accepted  |
|  | Task Request - Declined  |
|  | Delivery Report - Read   |
|  | Delivery Report - Non-read                                       |
|  | Delivery Report - Delivery                                       |
|  | Delivery Report - Non-delivery                                   |
|  | Delivery Report - Other  |
|  | Message Recall - Success   |
|  | Message Recall - Failure   |

## NEO Folder symbols

|   |               |
|---|---------------|
|  | Correspondent |
|  | Saved Search  |
















### Outlook view Folder symbols

-  User folder
-  Inbox
-  Outbox
-  Sent Items
-  Deleted Items
-  Drafts
-  Junk E-mail
-  Contacts
-  Non-email (Calendar, Journal, Notes, Tasks)












### Filter symbols

-  Filter folders with Unread messages
-  Filter Unread messages
-  Filter Not Filed messages
-  Filter Flagged messages
-  Filter received messages
-  Filter sent messages
-  Date filter From... To...

### Toolbar (command) symbols

-  Reply to message
-  Reply to All addressees
-  Forward message
-  Fast synchronization
-  Full synchronization
-  Open Outlook
-  Find Correspondent
-  Search in Folder
-  Search for Conversation
-  New Search
-  Jump to Folder
-  Back to previous folder
-  Forward to next folder

### Other symbols

-  Help
-  Catalog
-  Folder Properties
-  Search - Update word index
-  Search - Save current search
-  Search - Choose search folder
-  Folder List Filter - Tree order
-  Folder List Filter - Alphabetical order
-  Folder List Filter - Recently-used order
-  Previous message
-  Next message

## Privacy Policy

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Click <http://www.emailorganizer.com/aboutus/privacy.php> to browse to our Privacy Policy.

## Trademark Notices

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