Level Up: Email

Email. Ooh, very sexy

Email is not dead

Everyone already has it

Lasts a long time

Slack messages disappear

Groups switch platforms

Easily searched and linked

Drag an email into a task

Link with hookmark

Threads work well in most apps

except for Gmail

Archiving with an external app is better

DEVONthink

Achieve Inbox Zero with "automation"

A group of Smart Mailboxes or Saved Searches

@INBOX
- Unread messages only
- Include flagged messages
- Include read messages from the last 3 days

@LATER
- Messages across accounts that don't need immediate attention

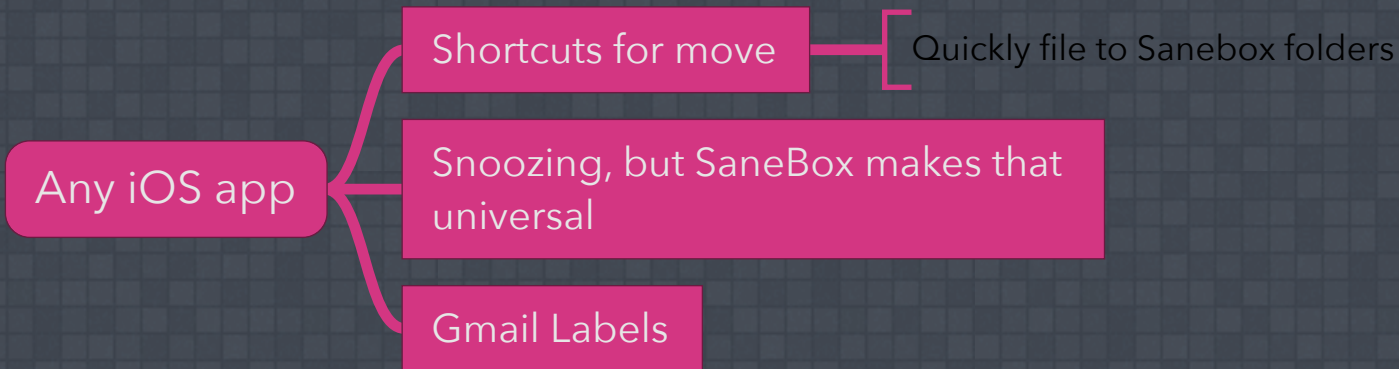@RESPOND
- Allow marking messages to respond to later

@DYING
- A review mailbox for housekeeping

SaneBox

MailMate

But tips for Mail.app and Gmail, plus other promising solutions

Shortcuts for move — Quickly file to Sanebox folders

Any iOS app

Snoozing, but SaneBox makes that universal

Gmail Labels

To start

Mark everything as read

Mark everything as read

You were never going to review those messages over a year old

You don't have to delete ANYTHING

You don't have to file ANYTHING

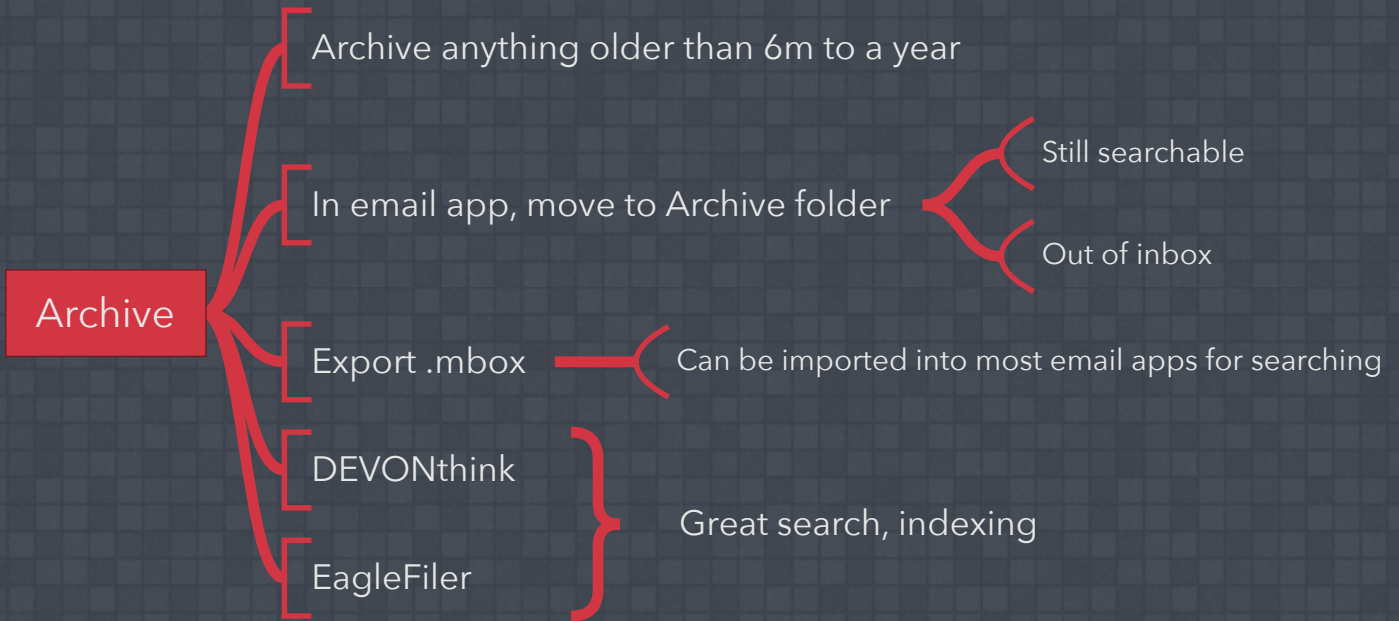Will still be searchable

Clean up inbox

Clean Email

- clean.email/
- iOS and Web
- Quickly archive and trash old emails with suggestions
- Unsubscribe from newsletters
- Create rules to clean in the future

Archive
- Archive anything older than 6m to a year
- In email app, move to Archive folder
  - Still searchable
  - Out of inbox
- Export .mbox
  - Can be imported into most email apps for searching
- DEVONthink
- EagleFiler

Great search, indexing

Use search to flag or star important messages in memory

Set up SaneBox (optional)

👤Dashboard ❓

me@brettterpstra.com

Only Important email stays in this Inbox.
New contacts and less timely email is moved to SaneLater. (change) ❓

📰 **Digest** `755`
Ready at 8am today

🌙 **Do Not Disturb**
Schedule `TRY!`

🔔 **Reminders**
View

🎓 **Trainings & Filters**
View

📁 **Folders**
View

☁️ **Attachments**
Connect… `TRY!`

☑️ **Organize** ❓
View emails

🪣 **Deep Clean** ❓
View emails `NEW!`

⚙️ **More Settings**
View

⏸ Pause filtering… | Show less…

Easily categorize emails
- @SaneLater
- @SaneNews

Future emails affected whenever you move a message

@SaneBlackHole

@SaneNoReplies

Custom Sane boxes
- @SaneDeals
- @SaneAnnoyingShitIStillHaveToDealWith

Do Not Disturb

Attachment cleanup

Custom Snooze mailboxes — Works with any client

Companion iOS app — Great for reviewing

Multiple accounts
- Gmail
- Yahoo
- iCloud
- Other
- Combine with smart mailboxes

[Insert dad joke for levity]

Oh, that was rough.

You should use an app

Local copies

Integration with the rest of your system

- Archive
- Link with notes and tasks
- Easy access to linked messages
- Spotlight searching

For example...

Mail.app
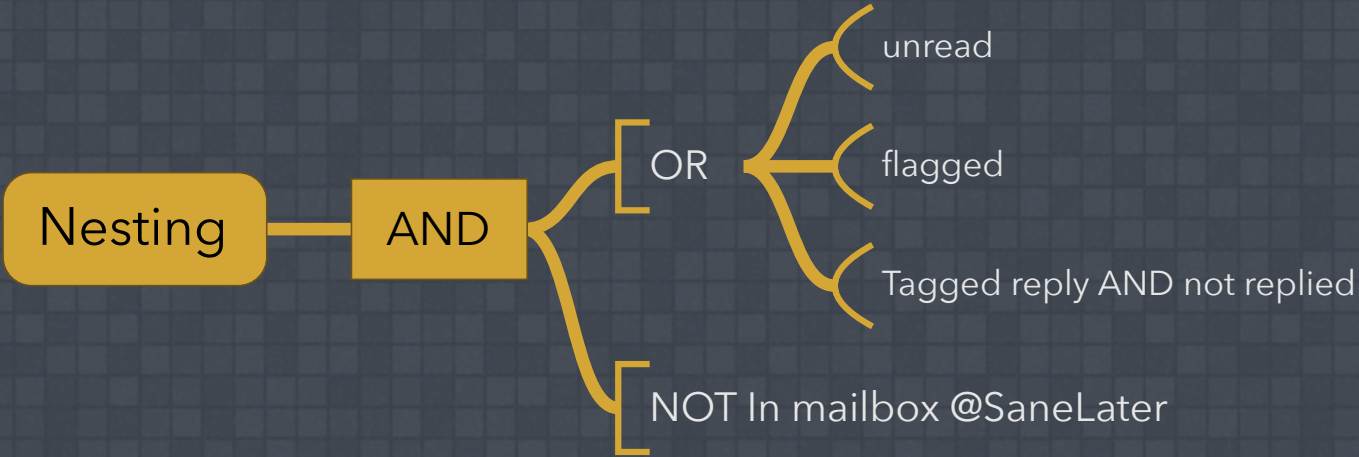
MailMate

Spark

AirMail

Booleans!

AND — "Matches all"

OR — "Matches any"

NOT
- "Matches none"
- Requires ALL with negative criteria

Nesting — AND
- OR
  - unread
  - flagged
  - Tagged reply AND not replied
- NOT In mailbox @SaneLater

Mail.app

Smart Mailboxes

Use Smart Mailboxes inside Smart Mailbox criteria to created nested booleans

@NOT

@RECENT

@RESPOND

Smart Mailbox Name: Unread Inbox

Contains messages that match [all ⬍] of the following conditions:

Message is in mailbox ⬍	📥 All Inboxes ⬍	⊖ ⊕
Message is unread ⬍		⊖ ⊕

☐ Include messages from Trash

☐ Include messages from Sent

[Cancel] [**OK**]

Unread Inbox

Smart Mailbox Name: @RECENT

Contains messages that match [all ⬍] of the following conditions:

Message is in mailbox ⬍	📥 All Inboxes ⬍			⊖ ⊕
Date received ⬍	is in the last ⬍	3	days ⬍	⊖ ⊕
Message is not in mailbox ⬍	⚙ @NOT ⬍			⊖ ⊕

☐ Include messages from Trash

☐ Include messages from Sent

[Cancel] [**OK**]

Recent

Smart Mailbox Name: @INBOX

Contains messages that match any ⇕ of the following conditions:

Message has flag ⇕	🚩 Red ⇕	− +
Message is in mailbox ⇕	⚙ Unread Inbox ⇕	− +
Message is in mailbox ⇕	⚙ @RECENT ⇕	− +

☐ Include messages from Trash
☐ Include messages from Sent

Cancel   OK

@INBOX

Smart Mailbox Name: @RESPOND

Contains messages that match [all ⇅] of the following conditions:

Message has flag ⇅	🚩 Orange ⇅	−	+
Message is in mailbox ⇅	📥 All Inboxes ⇅	−	+
Message was not replied to ⇅		−	+

☐ Include messages from Trash
☐ Include messages from Sent   Cancel   OK

@RESPOND

Notifications

General

General | Accounts | Junk Mail | Fonts & Colors | Viewing | Composing | Signatures | Rules | Extensions | Privacy

Default email reader: [✉ Mail ⬍]

Check for new messages: [Automatically ⬍]

New messages sound: [New Messages Sound ⬍]

☑ Play sounds for other mail actions

Dock unread coun

New message notifications

Downloads folde

Remove unedited downloads

☑ Follow Up Suggestions
Mail will remind you about mes

☐ Archive or delete muted m

☐ Automatically try sending later if outgoing server is unavailable

☑ Prefer opening messages in split view when in full screen

When searching all mailboxes, include results from:

☑ Trash

☐ Junk

☐ Encrypted Messages

✓ Inbox Only

All Mailboxes

⚙ @NOT

⚙ @LATER

⚙ @RESPOND

⚙ @INBOX

⚙ Unread Inbox

⚙ @RECENT

?

Colored Flags

Red for Preserve

Orange for Needs Response

OmniFocus Send to Inbox Service

Things Quick Entry with Autofill

Gmail

Labels

Colored stars

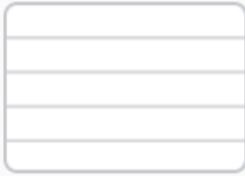# Powerful search syntax
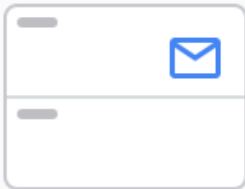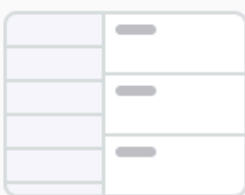
A little tricky

e.g. is:unread OR has:yellow-star OR label:reply OR newer_than:3d

Allows boolean searches

Can be nested wit parentheticals

Possible to create @INBOX type mailboxes

Inbox type

Default

Customize

Important first

Unread first

Starred first

Priority Inbox

Customize

Multiple Inboxes

Customize

Multiple inboxes

Inbox type: Multiple Inboxes ⌄

Multiple inbox sections:

Add up to 5 custom sections that you can view alongside your inbox

Learn more

	Search query	Section name (optional)
Section 1:	label:respond OR (in:inbox AND is:unread)	@INBOX
Section 2:	is:starred OR label:review	Review
Section 3:		
Section 4:		
Section 5:		

Maximum page size: Show 20 conversations per page for the multiple inbox sections

Multiple inbox position:
- ○ Right of the inbox
- ● Above the inbox
- ○ Below the inbox

MailMate

Smart Mailboxes

Nested conditions

@INBOX

Mailboxes	Conditions	Submailboxes	Rules

☐ Include messages in any submailboxes of this mailbox

Hold down ⌥ to create compounds

All ⇅ of the following mailboxes ⊖ ⊕

    Any ⇅ of the following mailboxes ⊖ ⊕

        ⚙ @RESPOND ⇅ ⊖ ⊕

        ✉ BrettTerpstra.com ▸ INBOX ⇅ ⊖ ⊕

        ⚙ @Flagged ⇅ ⊖ ⊕

        ✉ nvUltra ▸ INBOX ⇅ ⊖ ⊕

        ✉ iCloud ▸ INBOX ⇅ ⊖ ⊕

    None ⇅ of the following mailboxes ⊖ ⊕

        ⚙ NOT ▸ Action ⇅ ⊖ ⊕

        ⚙ NOT ▸ Sane misc ⇅ ⊖ ⊕

        ⚙ NOT ▸ Gmail Special ⇅ ⊖ ⊕

        ⊞ Oracle ⇅ ⊖ ⊕

Mailboxes

@INBOX

| Mailboxes | Conditions | Submailboxes | Rules |

Hold down ⌥ to create compounds

- ☑ **Any ⇅** of the following are true ⊖ ⊕
  - ☑ **All ⇅** of the following are true ⊖ ⊕
    - ☑ **Date ⇅** | **is within last ⇅** | 3 | **days ⇅** ⊖ ⊕
    - ☑ **Tags ⇅** | **does not contain ⇅** | @done ⊖ ⊕
  - ☑ **Message is Flagged ⇅** ⊖ ⊕
  - ☑ **Message is not Read ⇅** ⊖ ⊕
  - ☑ **All ⇅** of the following are true ⊖ ⊕
    - ☑ **Tags/Keywords ⇅** | **include ⇅** | **respond ⇅** ⊖ ⊕
    - ☑ **Message is not Replied ⇅** ⊖ ⊕

Conditions

Mailboxes

⚙ @INBOX

> ⚙ @ORACLE — 3

⚙ @LATER — 14

⚙ @RESPOND

⚙ @CODING

> ⚙ @READING — 849

⚙ @DYING — 2

> ⚙ @WORK

⚙ @OTHER — 5335

⚙ @GITHUB — 26

∨ ⚙ Topics

> ⚙ Systematic

⚙ Marked

Others

⌄ ⚙ @READING | 849

D.L. Mayfield from Healing is…	5
Flipboard	70
Flipboard Photo Desk + AP	8
Flipboard Photographers	11
Flipboard Politics Desk	1
Futurist Jim Carroll	72
George Takei	24
Ken Klippenstein	11
Mark E. Jeftovic	2
Medium Membership	15
New York Times Games	16
Quora Digest	2

Sender Submailboxes

- ⚙ NOT `5940`
  - ⚙ Sane misc `1994`
  - ⚙ Gmail Spe... `1366`
  - ⚙ Gmail Filed
  - ⚙ Action
  - ⚙ Code
  - ⚙ Business
  - ⚙ Projects
  - ⚙ Podcasts
  - ⚙ Money

@NOT

	Display Name	IMAP Keyword		Gmail Label
	macstock	macstock	↕	
🖥	marked	marked	↕	Coding-marked
	money	money	↕	Money
n	nvultra	nvultra	↕	Coding-nvultra
	overtired	overtired	↕	overtired
	Projects	Projects	↕	Projects
	receipt	receipt	↕	Money-receipt
	reference	reference	↕	Actions-reference
	register	register	↕	
	reps	reps	↕	business-reps
🖊	respond	respond	↕	respond
	sponsors	sponsors	↕	sponsors
	stretchlink	stretchlink	↕	
	systematic	systematic	↕	systematic
	tagging	tagging	↕	projects-tagging
	taxes	taxes	↕	
☑	todo	todolist	↕	Actions-todo
	waiting	waiting	↕	
	warranty	warranty	↕	

Tags

Synced to gmail labels

@INBOX tags
- done
- respond

Categorization
- expense
- marked

Keyboard shortcuts

```
{
    " " = "scrollPageDownOrNextUnreadMessage:";
    // Based on: http://mail.google.com/support/bin/answer.py?answer=6594
    "c" = "newMessage:";
    "/" = "mailboxSearch:";
    "n" = "nextUnreadMessage:";
    "p" = "previousMessage:";
    // force focus on outline before executing
    "j" = ("makeFirstResponder:", "mainOutline", "nextThread:" );
    "k" = ("makeFirstResponder:", "mainOutline", "previousThread:" );
    // switch to message viewer
    "M" = ("makeFirstResponder:", "messageView");
    "o" = "openMessages:"; // Gmail: Also expands or collapses a message if you are in
    'Conversation View.'
    "e" = "archive:";
    // "R" = ( "toggleTag:", "Respond" );
    "#" = "deleteMessage:";
    "x" = "deleteMessage:";
    // "m"  = ( "toggleMuteState:", "archive:" ); // FIXME: Should be 'markAsMuted:'
    "s" = "toggleFlag:";
    "!" = "moveToJunk:";
    "r" = "reply:";
    "R" = "replyAll:";
    "f" = "forwardMessage:";
    "^s" = "saveDocument:";
    // l Label
    "v" = "moveToMailbox:";
```

Gmail shortcuts

Shortcuts for tags like respond and @done

m,x for expense

m,r for respond

Bundles

OmniFocus

Things

Text Editors

Reminders

Calendar

GitHub

Create a task from an email with one keystroke

Dock Badges

Counters

General | **Counters** | Viewer | Composer | Signatures | Tags | Bundles | Security | Software Update

Display: ☑ In dock   ☑ In menu bar
☐ Notifications

Mailbox: ✉ @INBOX

Count: Unread

Sound: Glass

Format: "${subject}" from "${from.name.#nospoof:${from.address}}"

Dock Icon
Counter Positions

?

```
                                        ┌ Nested criteria builder
                           Solid search ┤
                                        └ Search any header

                           Markdown support ── Live preview

                           PGP/encryption

Other stuff                Smart sender account selection

                           Change email subject

                           Send later

                           Conversation/threaded views
```
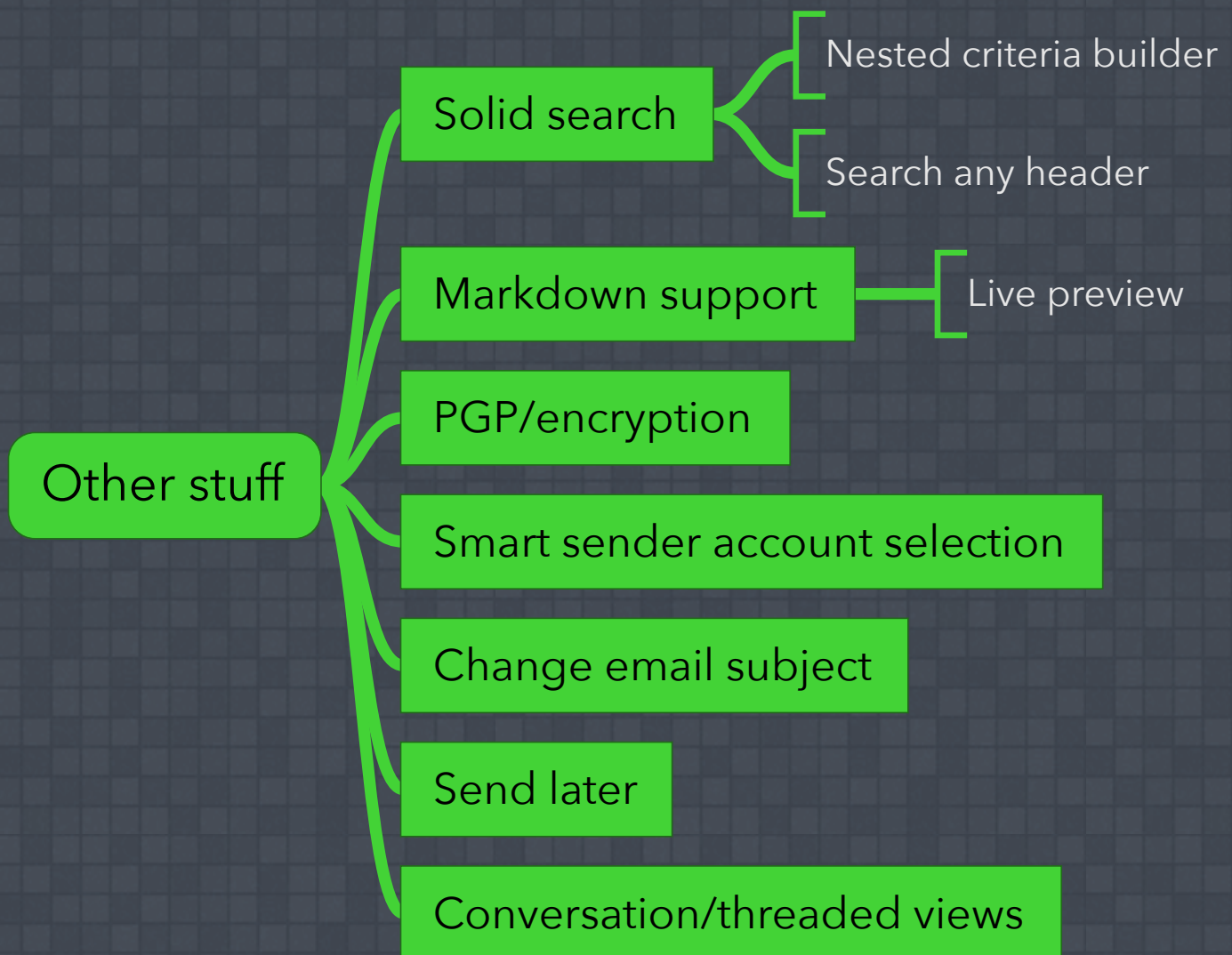
iOS

I've never found an iOS email app that fits my needs (and desires)

Smart mailboxes

Markdown support

Good search

Spark

Preside

Fugly

Good search
- History can kind of be smart mailboxes
- No "OR" search

Multiple accounts
- Rackspace
- Gmail
- iCloud
- Office365
- Outlook

Gmail

Best search

Unread — Across all mailboxes 😔

Multiple accounts
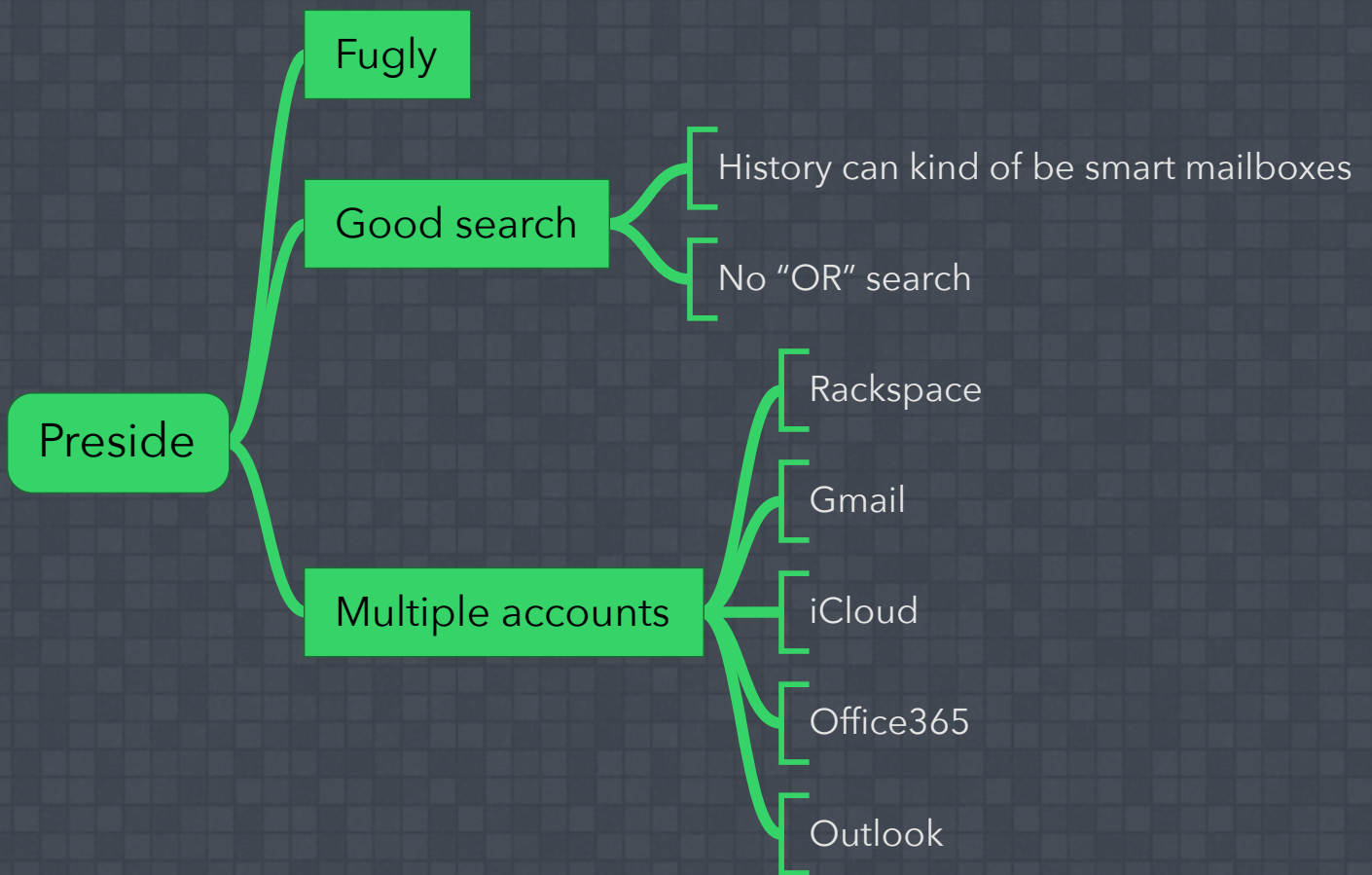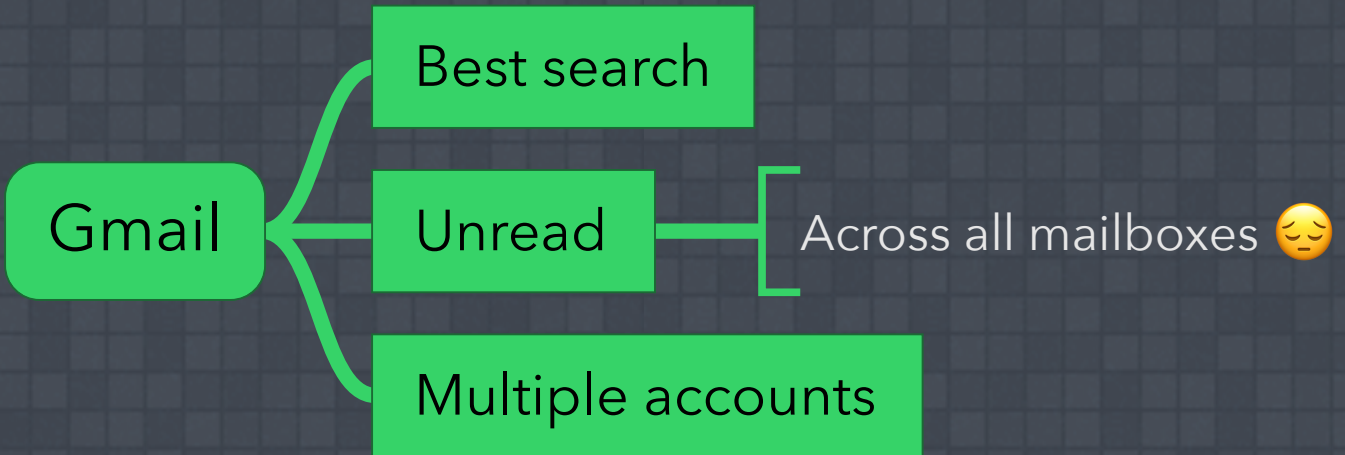
Customizable swipes

Airmail

Custom Action

Archive
Trash
Star
Snooze
Mark as Read
Spam
Move to
Apply Label
To Do
Memo
Done
Add Sender to VIP
Mute
Block
Unsubscribe
Send to Calendar
Send to Reminder
Reply
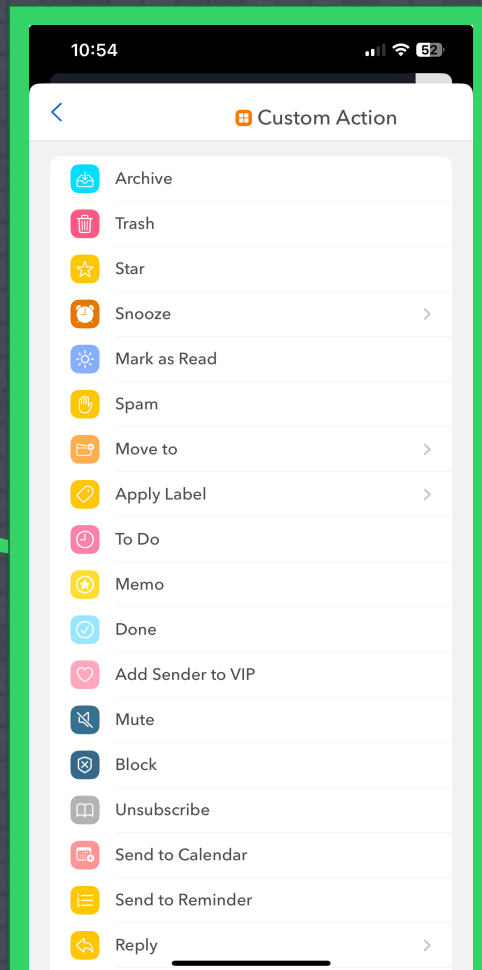
actions

Send to OmniFocus

File to folder/label

Clean Email

- Best handling suggestions
- Default Smart Mailboxes
- Not a great general email client

Promising Apps

Shortwave

- AI email assistant
- AI-powered search
- Gmail-like interface
- Conversations threaded inline
- Label bundles
- Scheduled delivery
- Todo lists from emails
- Read receipts
- 🙁 $7/mo for things like full search (1/yr), max 5 years ($24/mo)

Mimestream ——— Great Google integration

Superhuman ——— AI emails —— One line composer

Spark for Mac ——— Clever inboxes

Missive ⟨ Plugins/Integrations
        Team chat around email
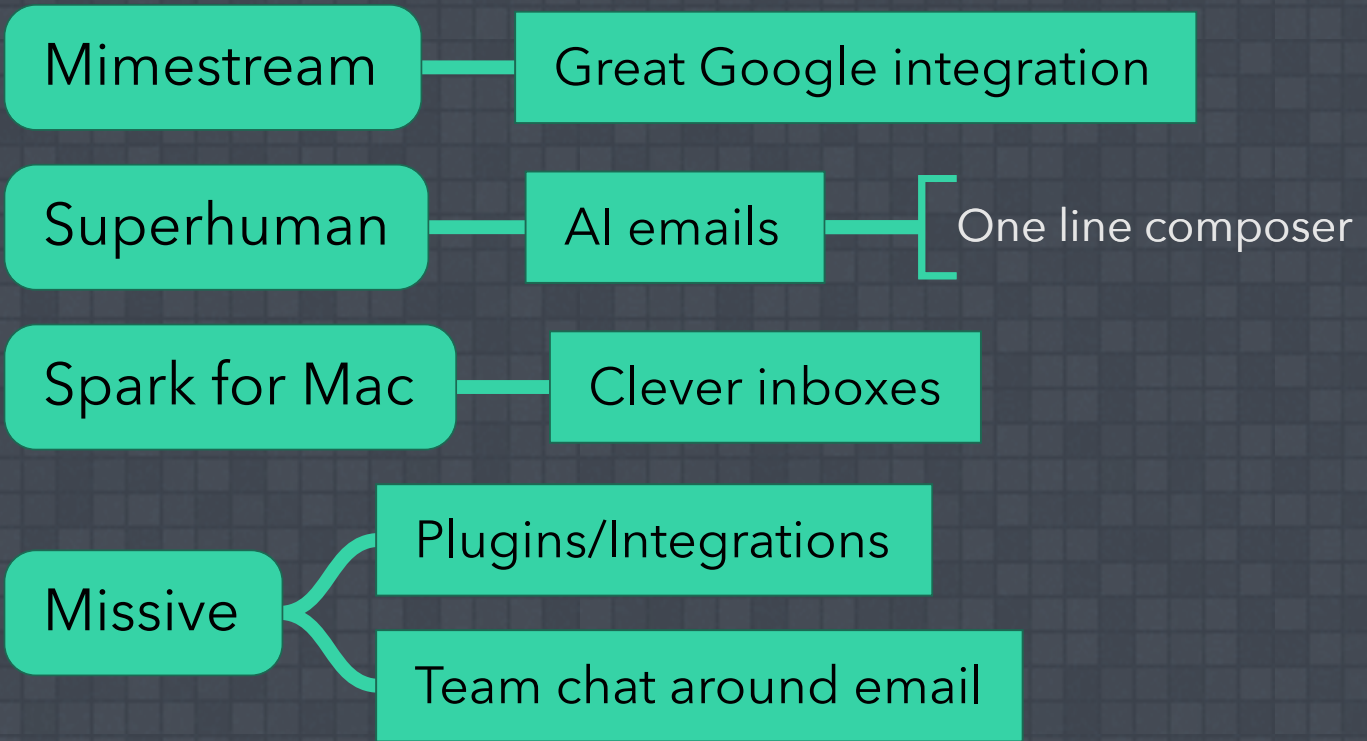
Deal with combined inboxes whenever feasible

Most email apps provide a unified inbox with unread only options

Smart Mailboxes make this easier and offer finite control

Combine all Inboxes or specific mailboxes in Smart Mailboxes

Multiple email accounts

Create smart mailboxes per account

Create one smart mailbox that combines them

Taking action

Mark as read to remove from @INBOX

Mark as flagged to keep in inbox

Use Service/Quick Entry for app

Use bundle in MailMate

Gmail/Shortwave offer built-in todo mangament

Create task in OmniFocus (or whatever)

Add to notes/Archive

Copy text and link message

Some services and Shortcuts can do this automatically

Dragging a message to most apps will create a link, regardless of client

DEVONthink

EagleFiler

Keep It

Curio

nvUltra/Obsidian/plain text app

Notes.app

Fully indexed, Spotlight searchable

DEVONthink

EagleFiler

Keep It

Curio

Searchable in app, Spotlight { nvUltra/Obsidian/plain text app

Notes.app

Add to calendar
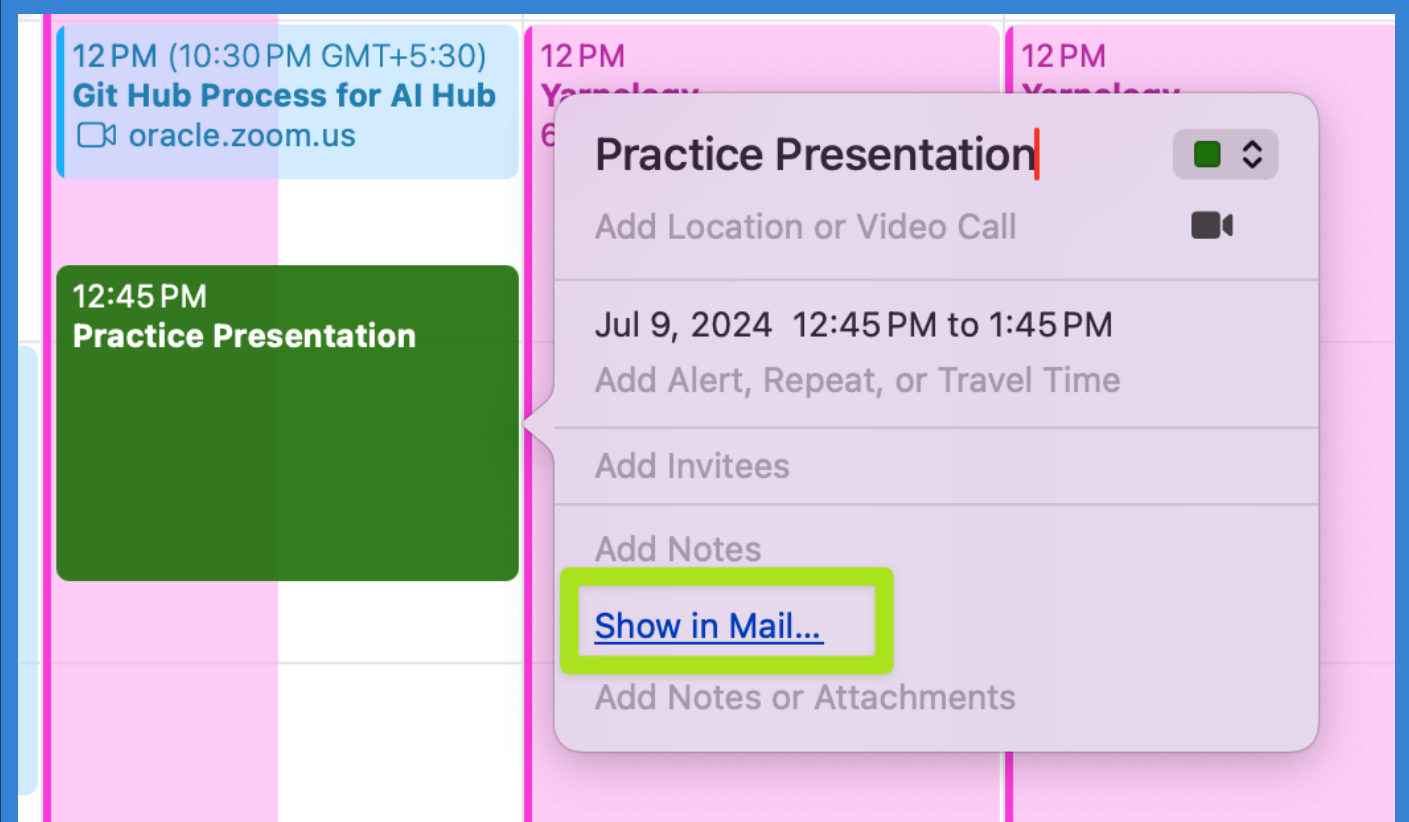
Drag Email to Calendar.app to create quick link

Mark as needs reply

Tag/flag

Move to respond folder/label

I can't believe you're trying the dad joke thing again.

It didn't work, did it?

Reviewing

Unread Inbox Messages

Aggressively filtered by SaneBox, Filters, and Rules

outdated emails

newsletters

Be careful not to make overly aggressive and check back regularly to make sure it's not deleting/archiving emails you want to keep

@LATER

Same criteria as @INBOX but limited to @SaneLater folders from all accounts

Read dailyish

File to other @Sane folders if it's stupid or unnecessary

@RESPOND

Criteria

Reply to messages that are waiting

Once replied, automatically removed from mailbox

Untag/flag messages that have aged past reply window

@DYING

@DYING

Mailboxes	Conditions	Submailboxes	Rules

☐ Include messages in any submailboxes of this mailbox

Hold down ⌥ to create compounds

Any ⇕ of the following mailboxes	⊟ ⊞
⚙ @RESPOND ⇕	⊟ ⊞
✉ @INBOX ⇕	⊟ ⊞

Mailboxes

@DYING

Mailboxes | Conditions | Submailboxes | Rules
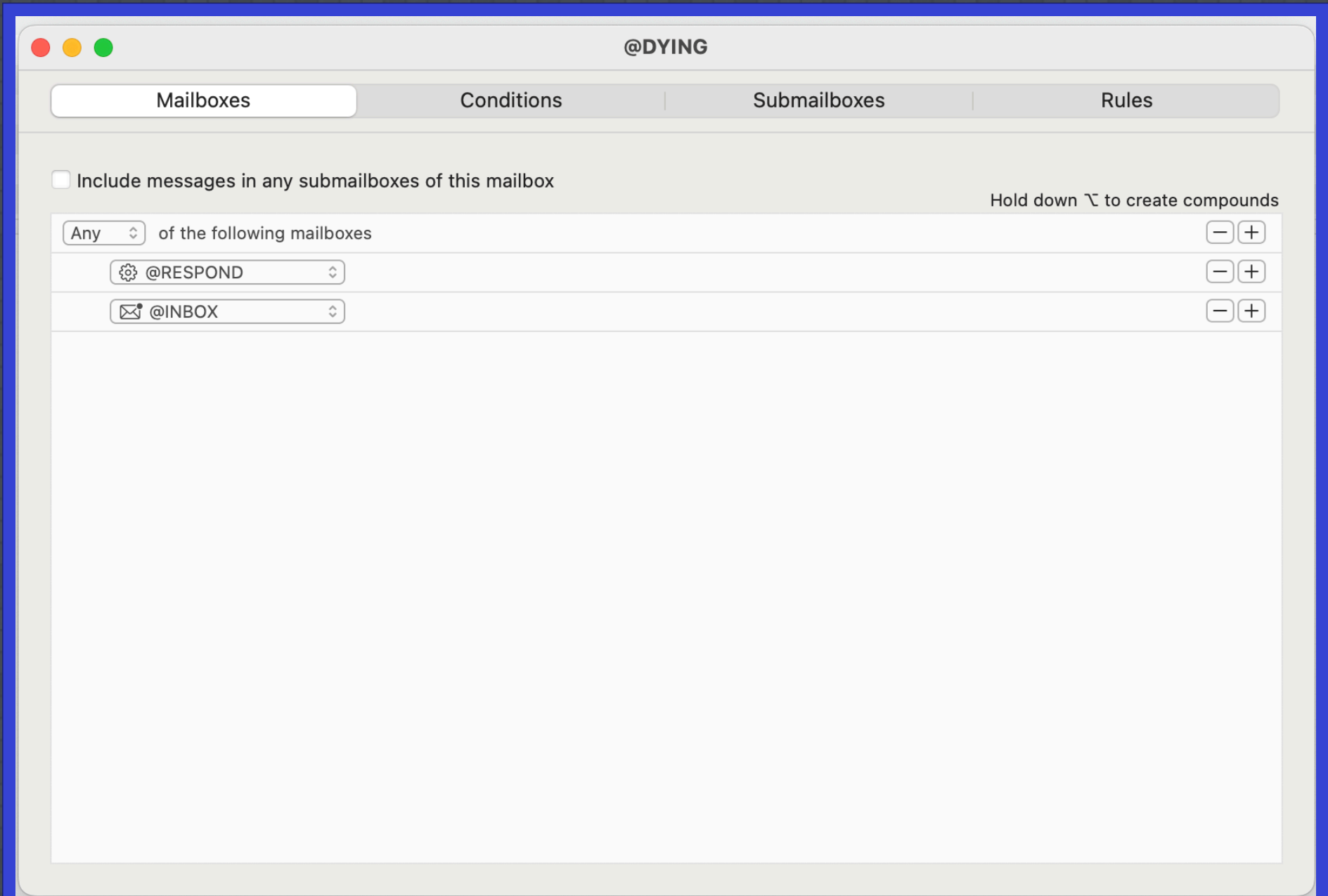
Hold down ⌥ to create compounds

☑ [All ⇅] of the following are true ⊖ ⊕
  ☑ [Date ⇅] [is not within last ⇅] [14] [days ⇅] ⊖ ⊕
  ☑ [Any ⇅] of the following are true ⊖ ⊕
    ☑ [All ⇅] of the following are true ⊖ ⊕
      ☑ [Tags/Keywords ⇅] [include ⇅] [respond ⇅] ⊖ ⊕
      ☑ [Message is not Replied ⇅] ⊖ ⊕
      ☑ [Message is not Forwarded ⇅] ⊖ ⊕
  ☑ [Message is Flagged ⇅] ⊖ ⊕

Criterium

Untag/flag old messages

Automatically removed from mailbox]

try.sanebox.com/be2h3q

SaneBox ($25 off)

b

Brett Terpstra

me@brettterpstra.com

brettterpstra.com

ttscoff everywhere

Brett Terpstra

me@brettterpstra.com

brettterpstra.com

ttscoff everywhere

MailMate

freron.com

try.sanebox.com/be2h3q

/ Level Up: Email

https://api.qrserver.com/v1/create-qr-code/?qzone=1&data=https%3A%2F%2Fbrettterpstra.com%2Fmacstock2024

/ Level Up: Email / Concept / Email.

https://cmkt-image-prd.freetls.fastly.net/0.1.0/ps/5397226/1820/2730/m1/fpnw/wm1/ndvld9i93olzarioqzuu6a3bbnxody4gfmpvjyorvip7x9alegcm2kti4tc3ktsv-.jpg?1542627643&s=cfeb8b5f8850e9a99b7761a2c34e27f8

/ Level Up: Email / Concept / Email. /

https://cmkt-image-prd.freetls.fastly.net/0.1.0/ps/5397226/1820/2730/m1/fpnw/wm1/ndvld9i93olzarioqzuu6a3bbnxody4gfmpvjyorvip7x9alegcm2kti4tc3ktsv-.jpg?1542627643&s=cfeb8b5f8850e9a99b7761a2c34e27f8

/ Level Up: Email / Concept / Email is not dead / Easily searched and linked

```
Well, in Gmail, anyway
```

/ Level Up: Email / Concept / A group of Smart Mailboxes or Saved Searches / @INBOX

```
Shows only unread messages, flagged messages, and optionally read messages
within the last three days.
```

/ Level Up: Email / Concept / A group of Smart Mailboxes or Saved Searches / @LATER

```
Same as @INBOX, but for SaneLater folder.
```

/ Level Up: Email / Concept / A group of Smart Mailboxes or Saved Searches / @RESPOND

```
Messages that need a reply but don't warrant a task in your task manager.
Shows flagged or tagged "Respond" messages that have not been replied to.
Does not require flags, once the email is replied to, it disappears.
```

/ Level Up: Email / Concept / A group of Smart Mailboxes or Saved Searches / @DYING

```
Flagged and "respond" messages older than 7 days. Used to keep the inbox
clean.
```

/ Level Up: Email / Concept / MailMate

https://freron.com/

/ Level Up: Email / To start / Clean up inbox / Clean Email

https://clean.email/

/ Level Up: Email / To start / Clean up inbox / Clean Email / clean.email/

https://clean.email/

/ Level Up: Email / Mail.app / Smart Mailboxes / Use Smart Mailboxes inside Smart Mailbox criteria to created nested booleans

```
Is (not) in mailbox
```

/ Level Up: Email / Mail.app / Smart Mailboxes / @NOT

```
Can take a while to set up but can be used repeatedly
```

/ Level Up: Email / Mail.app / Colored Flags

```
Use as criteria in Smart Mailboxes
Red for Preserve
Orange for Needs Response
```

/ Level Up: Email / MailMate / Keyboard shortcuts

```
Completely configurable.
```

/ Level Up: Email / Promising Apps / Shortwave

https://shortwave.com

/ Level Up: Email / Taking action / Create task in OmniFocus (or whatever)

- Mark as read once added
- Quick entry
- Shortcut from MailMate bundle
- Service in Mail/other

/ Level Up: Email / Taking action / Add to notes/Archive

Notes:

- Notes.app
- nvUltra
- Obsidian
- Etc.

```
Copy text with link to email. Drag from Mail, Copy link from MailMate, or
link with Hookmark.
```

Archive:

- DEVONthink
- EagleFiler
- Curio

```
Import entire threads, make indexable and searchable outside of email
client. Spotlight searchable.
```

/ Level Up: Email / Taking action / Mark as needs reply

- @REPLY mailbox
    - Doesn't need to be in Inbox
    - Tag in MailMate
        - Can sync to Gmail mailbox
    - Colored flag in Mail.app

/ Level Up: Email / Reviewing / @RESPOND

Tagged or flagged (Mail/Gmail) messages

/ Level Up: Email / Reviewing / @DYING

- Flagged messages older than 7 days
- In @REPLY older than 7 days

/ Level Up: Email / SaneBox ($25 off) / try.sanebox.com/be2h3q

$25 credit
https://api.qrserver.com/v1/create-qr-code/?qzone=1&data=https%3A%2F%2Ftry.sanebox.com%2Fbe2h3q