



# Settings

Help Documentation

## Settings

### User Settings

#### Account

The Account Settings section contains basic configuration options for a user's account, including their forwarding and reply-to addresses, webmail preferences and more.

To access your personal account settings, log in to SmarterMail and click on the Settings section. Then click on Account in the navigation pane. The following cards will be available, each with its own options:

- User
- Notifications
- Folder Auto-Clean
- Webmail
- Two-Step Authentication
- Forwarding

#### User

- Language - The language in which the interface is displayed. Note: The options displayed here are dependent upon the translation files the SmarterMail Administrator has added to the mail server. Furthermore, SmarterMail translation files are provided by product users, and SmarterTools makes no warranty on the correctness of the translation.
- Time Zone - The time zone of your location. This field determines the timestamp for items within the interface, including the date and time messages were received or a Note was updated.
- Reply-To Email Address - The email address used in the reply-to header for messages. This address will be used when the recipient replies to a message that was sent via webmail. Note: Only messages sent via webmail will include the reply-to address. If you use an email client that supports a reply-to address, the configuration must be made there as well.
- Recovery Email Address - The email address to which password reset instructions will be sent if you forget your account password. This is also the address used for Two-Step Authentication, if it's enabled for your user. (Or Forced by the Domain Administrator.) This address should be separate from the SmarterMail account, such as a Gmail or Yahoo! address, or even the default email address of a Domain Administrator. Note: The backup email address can only be used if the System Administrator has enabled password retrieval for the login page.

- **Plus Addressing** - Plus addressing allows users to automatically sort incoming email without creating content filtering rules first. One of its major benefits is that it allows users to generate special email addresses if they do not want to give out their real address. For example, if user@example.com needs to provide a valid email address to sign up for a newsletter, he can sign up for the newsletter using the following address: user+technewsletter@example.com. When the newsletter is delivered, it can automatically be routed to the Technewsletter folder. If the folder does not already exist, it can be created automatically. In addition, if you include the "/" character in your plus address, you can automatically create subfolders. For example, the plus address myname+Newsletters/ACME@example.com will create a folder called Newsletters, then create an ACME folder under it, and drop the newsletter into the ACME folder. As an added bonus, you can connect to folders in your email using POP3 by using plus addressed emails. The example above, when input into your POP email client as your login name, will return the contents of that folder. Note: For plus addressing to work, the plus (+) sign is required AFTER the username but BEFORE the domain name. For example, username+foldername@domain.com).
- **Disabled** - Select this option to turn off plus addressing for your account.
- **Move to Folder** - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, it will be created automatically. Note: To prevent abuse, no more than 10 folders can be auto-created in this method during a six hour period.
- **Move to Folder (If Exists)** - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, the email will be placed in the Inbox.
- **Leave in Inbox** - The incoming message will be placed in the Inbox.

## Notifications

Browser notifications allow your browser to alert you about common activity within SmarterMail, even if your browser window is minimized or hidden behind other screens. Note: In order for browser notifications to work, your browser must be running and logged into a SmarterMail site.

A request to enable browser notifications will appear upon your first login to SmarterMail, when using a new browser or after clearing your standard browser's cookies. If your Account Settings page shows the message:  Browser notifications have been disabled in this browser,  it means that you have denied the request to push these alerts. Instructions on how to enable notifications for a site vary with each browser, so we encourage reviewing your browser documentation for the exact steps.

The following alerts can be enabled or disabled for browser notifications.

- **Calendar reminders** - Enable or disable notifications for calendar appointments that have a reminder enabled.

- Chat messages - Enable or disable notifications when a chat message is received from SmarterMail's standard Chat section or a Team Workspace.
- New emails - Enable or disable notifications when an email is received in your Inbox.

## Folder Auto-Clean

Setting up auto-clean rules for email folders is a simple, yet effective, way to limit how much of your disk space is taken up by messages in default folders like Junk Email, Sent Items, and Deleted Items. By placing limits on the size of these folders, or by automatically deleting mail older than X number of days, you can help ensure that your disk space does not fill up unnecessarily. In addition, if you want to set a size limit on a folder, messages are deleted in the order that they were received so that older messages get deleted first.

- Override auto-clean settings - Enable this setting to override the settings established by the Domain Administrator, allowing you to create your own rules. Any changes you make will not be affected if the System Administrator changes their policy, unless they disable domain overrides.

If the "Override auto-clean settings" setting is missing, the auto-clean rules created by the Domain or System Administrator will be displayed at the bottom of this card. If no rules were created by an Administrator, a note saying such will be displayed.

However, if "Override auto-clean settings" is turned on, you're presented with a New rule button that will allow you to create your own rule(s). Auto-clean rules can be created for any default mail folder, and can be created based on a message's age or the folder's size.

## Webmail

- Theme - Specify the general color theme of the SmarterMail interface: Light or Dark.
- Delete Email Action - To specify the action performed on deleted messages, select the appropriate action from the list. NOTE: This action only affects messages. If folders are deleted, the folder and its contents will always go to the Deleted Items folder.
- Move to Deleted Items folder - Deleted items will appear in the deleted items folder, which will need to be regularly emptied.
- Permanently Delete - Permanently deletes and purges the message. Note: When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.
- Mark as Deleted - Flags the message for deletion, but it does not move messages to the Deleted Items folder and messages remain until the folder is purged.
- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list. By default, SmarterMail sets the encoding

to Western European (ISO). However, SmarterMail supports encoding for over 35 different text formats, thereby supporting encoding for most parts of the world.

- **Compose Font** - Specify the default font for emails by selecting an option from the list.
- **Font Size** - Specify the default font size for emails by selecting an option from the list.
- **Default From Address** - Select the email address that you reply from by default for messages sent through webmail. Your SmarterMail email address and any domain aliases or SMTP accounts configured for your account will be shown in this list. (This setting does not prevent you from manually changing the Send From address when composing a message.)
- **Preview Pane** - To specify where the preview pane displays in the webmail interface, select the appropriate option from the list: Right, Bottom or None. By default, the preview pane appears to the right of the messages list. Disabling the Preview Pane means only a list of messages appears in the content pane and each message will need to be opened separately in order to view their contents. --%>
- **Search Language Indexer** - The language that the Lucene indexer will index against. In most cases, Generic Indexer is the best selection as it incorporates English and common umlauts. However, if the interface is viewed in certain languages, such as Chinese, Japanese, or Korean, this setting should specify the language for better indexing results.
- **Use To: address for replies** - When enabled, replying to a message via webmail will use that email's To: field as the Send From address of your reply, regardless of whether the message was sent to your SmarterMail email address or a domain alias, email alias, SMTP account, disposable address or plus address. For example, if an email is sent an alias you are part of, replies to that email via webmail will automatically use the email alias address as your Send From address. (This setting does not prevent you from manually changing the Send From address when composing a message.)
- **Request read receipts by default** - Select this option to automatically request read receipts for all outgoing messages sent via webmail. When this setting is enabled, all outgoing messages that are sent via webmail will request that the recipient(s) send a read receipt when the message has been read. If the read receipt is sent by the recipient(s), you will receive a message from the system administrator confirming that the message has been read. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.
- **Request delivery receipts by default** - Select this option to automatically receive delivery receipts for all outgoing messages sent via webmail and email clients. When this setting is enabled, you will receive a message from the system administrator verifying the delivery status of your outgoing message. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.
- **Mark messages downloaded by POP as read** - Enable this option to mark all messages that are

downloaded via a POP3 connection as read.

- Show images from external websites - Enable this option to automatically display all in-line remote content when an email is viewed. (Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in the message.) When this is enabled, you will not have to manually display the remote content on emails you receive; it will be visible automatically. Note: Emails from trusted domains and senders will always display remote content automatically.
- Allow Inline Images From - Here you can enter the email addresses or domains (one entry per line) whose in-line remote content should be displayed automatically, even if the previous setting is turned off. If an email address is entered, emails received from that address will automatically display all remote content. If a domain is entered, remote content that comes from a source containing that domain will be automatically displayed. For example, if "smartertools.com" was entered in this field, remote content from a source of "https://images.smartertools.com" would be automatically displayed, even if that email was sent from user@example.com. (If an exception for an email address is added from an email directly, that email address will be listed here.) Note: Emails from trusted domains and senders will always display remote content automatically.

## Two-Step Authentication

When enabled for a domain by the System Administrator, Two-Step Authentication adds an extra layer of protection to your SmarterMail account. It ensures that only YOU can access your account, even if someone knows your password.

When your account is protected with Two-Step Authentication, logging into webmail requires two methods of authentication: your SmarterMail account password and a verification code that's only available to you. This code can be generated from an app, like the Google or Microsoft Authenticator apps available for iOS and Android, or delivered via a recovery password that's set up for your account. In addition, if you access email using a mobile or desktop email client, such as Microsoft Outlook or Apple Mail, you will need to use "application passwords" when setting up those accounts. (If the account is already set up in an email client, you'll need to re-log in using an application password after Two-Step Authentication is set up.)

Once you click the Enable button, you'll walk through the process of setting up Two-Step Authentication. The steps you walk through depend on which type of authentication you select: Authentication App or Recovery Address. Regardless, the fields you'll see are as follows:

**Two-Step Authentication** ?

Email clients or applications that use your account will be disconnected until you reconnect those accounts using the new Application Passwords.

When logging in, your account will be secured with a password and verification code. Retrieve the code through an authenticator app, such as Google Authenticator, or a recovery email address.

**Verification Methods**

Authenticator App ▼

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Recovery Email Address \*

it.mycompany@gmail.com

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Confirm Recovery Email Address \*

it.mycompany@gmail.com

Cancel
Next

- **Verification Methods** - This is where you select the type of additional verification you want to use: Authenticator App (e.g, Google or Microsoft Authenticator) or Recovery Address. Regardless of which method you choose, you'll have to supply a Recovery Email Address. This is necessary even when using an Authenticator App for instances where issues occur with the app, such as the inability to scan a QR code, that may require an authentication code to be emailed to you.
- **Recovery Email Address** - This is an alternative email address, different than the one you're using, that can receive authentication codes. If you already have one set for your account, it will be displayed here. However, you can change it to a separate address if you so desire. You will have to re-enter this address to confirm it on the next line.
- **Verification Code** - If using the Authenticator App method, you'll be asked to scan a QR code with the app you want to use for authentication, then enter the code displayed by the app. If you're using Recovery Email Address, you'll need to enter the verification code that was emailed to that address.

### **Setting Up Two-Step Using a Recovery Email Address**

Using a Recovery Email Address means that each time you log in to webmail, a verification code will be sent to the Recovery Email Address you specify. You then enter that code on the SmarterMail login screen for your account, prior to being able to access webmail. To get started with using Two-Step with a recovery address, do the following:.

- Select Recovery Email Address from the Verification Methods dropdown.
- Enter and confirm the Recovery Email Address that will be used to retrieve the verification code. (This email address will automatically be used as the Recovery Email Address used for resetting your account password as well.)
- Click Next.
- Wait a moment for the verification code to be sent to that address, then enter the 6-digit code once it's received.
- Click Check to confirm the verification code and complete the Two-Step Authentication setup.

### **Setting Up Two-Step Using an Authenticator App**

Using an Authenticator App, such as Microsoft Authenticator, means that each time you log in to webmail, you'll retrieve the verification code from your authenticator app of choice. You then enter that code on the SmarterMail login screen for your account, prior to being able to access webmail. To get started using an Authenticator for Two-Step, do the following:

- Install an authenticator app, such as Google or Microsoft Authenticator, on your phone or computer. (In this article, we'll demonstrate how to set up Two-Step Authentication using Google Authenticator on your mobile device.)
- Select Authenticator App from the Verification Methods dropdown.
- Enter and confirm a Recovery Email Address that will be used as an alternative method to retrieve the verification code. If your authenticator app is not accessible, the verification code will be sent to this address instead. (This email address will automatically be used as the Recovery Email Address used for resetting your account password as well.)
- Click Next. A QR code will appear on the next page.
- Open the Google Authenticator app. Click "BEGIN SETUP" if you aren't already using it for other accounts, or use the plus (+) icon to add a new token.
- Select Scan QR Code to use your phone's camera to scan the code that's displayed in SmarterMail. A new token will be added to Google Authenticator.
- Enter the token's 6-digit code into SmarterMail.
- (If you can't scan the QR code, click on "Can't scan the QR code?" in SmarterMail. In the Authenticator app, choose to create a new token by Manual entry. In the Account field, enter a token descriptor, such as the username of your account. In the Key field, type in the secret key that's displayed in SmarterMail. Then enter the token's 6-digit code into SmarterMail.)
- Click Check to confirm the verification code and complete the Two-Step Authentication setup.

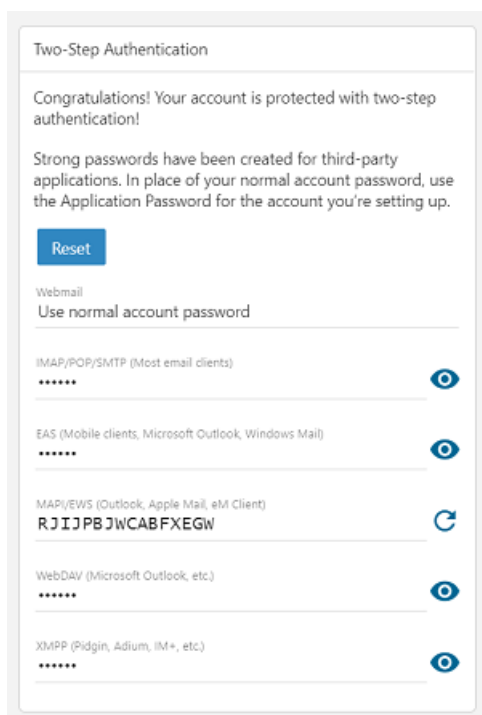
### **Logging in with 2-Step**

To log in to SmarterMail, enter your email address and password. Then enter the 6-digit verification code that's sent to your recovery email address or the token that's displayed in the authenticator app.



## Configure Third-party Applications with App Passwords

Note that once 2-Step Authentication is set up for your account, you will also need to re-configure any third-party applications or email clients using the "application passwords" that are automatically generated and displayed on the Two-Step Authentication card in your Account settings. Several passwords are provided based on the protocol-type being used. For example, an EAS password would be used for any mobile email client. Passwords can be used multiple times, in multiple clients. They can also be reset/refreshed. Be sure to use the correct password for the corresponding protocol.



Regardless of which method you use, having Two-Step Authentication set for your account is a great way to keep your email communication protected.

## Forwarding

If this card is not displayed, your account has not been permitted to utilize automated forwarding. This feature must be enabled for the domain and for your account. Contact a SmarterMail administrator for assistance enabling this feature.

- Forwarding Address - The email address to which messages sent to your mailbox will be automatically forwarded. Note: Messages routed to other email folders via content filters or plus addressing will also be forwarded to this address. Messages routed to the Junk Email folder will not be forwarded by default. However, these can be included if the domain's "Forwarding Exclusion" is set to "No exclusion - Forward all mail."
- Forward Method - To specify the method by which messages are forwarded, select the appropriate option from the list.

- Normal - Includes original content, including font styles from original message, as part of the new message.
- Text - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links, fonts or other formatting.
- Embed as Attachment - Attaches the original message to the new message as an attachment. The message will not appear in the body of your message.
- Delete messages when forwarded - Enable this option to delete messages from your SmarterMail mailbox after they are forwarded.

## Changing your Password

To change the password used to log into your SmarterMail account, click on the Change Password button at the top of the Account page. In order to protect your account security, you will be required to enter the current account password before entering the new one.

If your SmarterMail account credentials are handled in Active Directory or if you do not have permission to change your password, you will need to contact your domain or system administrator for assistance. Depending on who manages your SmarterMail email services, this could be the IT department of your company or a third-party hosting company / ISP.

## Profile

The Account Profile section contains details for a user, including their name, birthday, email address(es), work information and more. If a System Administrator has enabled the Global Address List (GAL), the information contained in a user's account profile will be publicly available to all other users on the domain if that setting is enabled when the User is created by the Domain Administrator. Users can access that public contact information only by accessing the GAL through webmail or LDAP. Note: LDAP is a feature available to SmarterMail Enterprise users only.

The information contained in a user's Profile will also be available in email clients, such as Microsoft Outlook. This is especially true when syncing to that client using a protocol such as MAPI. In addition, much of the information configured in a user's Account Profile is also available as a variable that can be used when Domain Administrators create domain level signatures. Regardless, you can fill out as much or as little of this information as you want.

To access your account profile information, log into SmarterMail and navigate to the Settings section. Then click on Profile in the navigation pane. Here, you'll be presented with a number of different cards:

## Personal Info

- Display Name - Your name as you want it to appear. For example, "Dan Henderson".
- Title - Whatever Title you want to be used, such as Mr., Mrs., Dr., etc.
- First Name - Your first name.
- Middle Name - Your middle name.
- Last Name - Your last name.
- Suffix - If you have a suffix, such as "Jr.", "III", "Esq.", etc., put it here.
- Home Page - If you have a personal website, you can enter the URL here.
- Instant Messenger - If you have an IM handle, or a Skype address, you can enter it here.
- Birthday - Your birth date goes here.
- Additional Information - You can pretty much add anything else you want in here: favorite color, pet's name, whatever. Note: To upload a profile picture, click on the avatar or current image next to your Display Name. Uploading a profile picture will automatically update your avatar in the webmail interface. However, profile pictures are not updated in any third-party chat clients, like Adium or Pidgin, until you log into the chat client and force a status change. That means that, when using the web-based chat client in SmarterMail, users in third-party clients may not see your updated picture.

## Phone Numbers

- Phone Number - Specify your home, work or mobile phone numbers, pager number and personal or company fax numbers. Once you add one number, another box appears below this one where you can add others.

## Email Addresses

- Email Address - Add any secondary email addresses you have, like a Gmail address, a personal email address, etc. If you want to remove an address, simply click the X button next to it.

## Addresses

- Home Address - Specify your home address, including your street address, city, state/province, postal code and country.
- Work Address - Specify your work address, including its street address, city, state/province, postal code and country.
- Work Info - Specify your work information, including your company name, job title, department, office, and the URL of your company's website.

## Other

This area allows you to add any additional information you want associated to your profile. This includes your Anniversary (work or marriage), your nickname, the name of your spouse or assistant, etc.

## Autoresponder

An autoresponder is a prewritten reply that is automatically sent when an email message is received. These are commonly used to notify senders of a change in contact information or that the recipient is out of the office or on vacation. For example, a standard autoresponder message could be: "I will be out of the office from June 1 to June 15. I will respond to your message upon my return to the office on June 16. If you need immediate assistance, please contact Jane Doe at [jdoe@example.com](mailto:jdoe@example.com)."

SmarterMail offers 2 types of autoresponder: one for domain users and one for "everyone else". This is helpful as you may want to let your co-workers know that, say, you're out of the office but you'll be available for calls if anything comes up, but let everyone else know that you're out of the office but will be back by a certain date. In addition, SmarterMail gives you some flexibility on who gets your "Out of Office" message and who doesn't.

To set up an autoresponder, log in to SmarterMail and click on the Settings icon . Then click on Autoresponder in the navigation pane. The following items will be available:

Note: If Autoresponder is not displayed in the navigation pane, the System Administrator of the installation must enable Autoresponders in the Antispam settings using the Options card > Autoresponders setting.

## Autoresponder

- Subject - The words or phrase that will appear in the subject of the autoresponder message (e.g. Out of Office).
- Response to Send to Domain Users - The message that will be automatically sent to the other accounts that have been set up for your domain. SmarterMail allows users to create HTML formatted autoresponders that can include stylized text, links, images and more.
- Response to Send to Everyone Else - This message will be sent to anyone outside of your domain. (Depending on the what's been set on the Options card.)

## Options

System Administrators can enforce a domain-wide autoresponder exclusion in order to prevent SmarterMail from sending autoresponder replies to spam messages. The autoresponder policy

configured for your domain will be displayed here. Otherwise, if no settings are passed down to you, you'll have the following options:

- Enable Autoresponder - Turn on the autoresponder.
- Disable responses to indirect mail - By enabling this setting, the autoresponder will only be triggered by email sent directly to you. Any email you receive through a mailing list, forward, or an alias will not trigger the autoresponder.
- Limit responses to once daily - Enable this setting to ensure an email address only receives the autoresponder message once per day, even if they send you multiple messages. If you disable this option, every email you receive will trigger your autoresponder message. It is HIGHLY recommended that you keep this option turned on to avoid the potential of your email address, your domain or even potentially your entire mail server from becoming blacklisted by an ISP.
- Only send between certain dates - Enable this setting to specify the date range that your autoresponder will be active. Then set the specified start and end dates and times. This option is particularly helpful for planned absences, like a vacation or extended holiday.
- Send To - This dropdown allows you to set up who received your autoresponder messages. You may not want to send one to just anyone who emails you, but only send them to a specific subset of people. This dropdown allows you to do just that.
- Domain Users Only - This will only send an autoresponder to others on your domain. In this instance, you'll only need to fill out the "Response to Send to Domain Users" message.
- Domain Users and Contacts Only - This will send an autoresponder JUST to others on your domain as well as anyone listed in "My Contacts". In this case, you'll want to fill out both messages.
- Everyone - This will send an autoresponder to anyone who emails you. In this case, you'll want to fill out both messages.

## Calendar Settings

SmarterMail gives users several customized settings for how they want calendars to appear. This includes the default timeframe to display, the location used for displaying weather forecasts, calendar auto clean rules and more.

To view your calendar settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Calendar Settings in the navigation pane. The following options will be available:

## Options

- **Calendar Auto-Clean** - SmarterMail allows you to keep past calendar events from cluttering up your calendar views. Generally Domain Administrators will set this option for all users of the domain. However, if you have the ability to set your own auto-clean parameters, you can do so with this setting.
- **Zip Code for Weather** - U.S. users can view the 7-day weather forecast in their area, or any area they choose, on their calendar. To enable this option, enter your postal code in the field. Weather forecasts are provided by the National Weather Service.
- **Display weekends** - Select this option to include weekends in your calendar. Because some people only use their calendars for the "business week," disabling weekends can help to keep a calendar clean and organized.
- **Display task start times in the calendar view** - Select this option to view the date and time a task is scheduled to start on the calendar.
- **Display task due times in the calendar view** - Select this option to view the date and time a task is scheduled to be completed on the calendar.
- **Hide completed tasks** - Select this option to remove completed tasks from the calendar view.

Note: Even though tasks may be displayed in your calendar, if you are syncing your calendar with a desktop and/or mobile email client, the task will not show up on your calendar. Instead, they will generally be considered notifications and will display in mobile and/or desktop clients accordingly.

## Business Hours

SmarterMail allows users to customize new calendar appointments to display their typical hours. For example, if you typically schedule appointments from 8 a.m. to 5 p.m., you can configure the business hours to correspond with those times, allowing SmarterMail to automatically scroll your calendar view to those hours. You can configure the visible hours for each day of the week to allow for flexibility in your schedule.

## Connectivity

SmarterMail provides a variety of options that allow users to manage and access third-party, external accounts directly within SmarterMail. To access these settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Connectivity in the navigation pane. The following options will be available:

Jump To:

- Cloud Storage - Link to files from services like Dropbox or OneDrive
- Email Retrieval - Download emails from third-party accounts directly into SmarterMail
- SMTP Accounts - Send emails from third-party accounts directly within SmarterMail
- Synchronized Devices - Review the syncing connections for your account
- Mailbox Migration - Importing email, contacts, calendars, tasks, and notes from third-party accounts

## Cloud Storage

SmarterMail can connect to third-party cloud storage providers, like Dropbox or OneDrive, so users can generate links to files stored in the cloud while composing emails. This allows users to quickly share files without worrying about attachment size limits on the server or increasing their mailbox size.

### Connecting a Cloud Service

To establish a new connection with a cloud storage provider, click **New Provider** . Select the service you wish to connect, then follow the on-screen prompts to complete the process. Once you are connected to a third-party account, you can generate a link to a file stored with that provider by clicking on the **Actions (...)** button while composing an email message. Then click on **Link File** .

### Removing a Connected Service

To remove a connected service, or to simply reset the connection, click on the provider from the list of connected services. Then click **Delete** .

## Email Retrieval

These days it's rare for someone to have, and use, a single email address. That's why SmarterMail's Email Retrieval feature is so great: it allows users to access email from another account directly within the SmarterMail Web interface. This means users can add their Gmail, Hotmail, Yahoo! or any other mail account to SmarterMail so that they can receive all of their emails, from a number of different accounts, from within a single interface.

A nice complement to Email Retrieval is SMTP Accounts. When used together, users can send and receive email from external accounts directly within SmarterMail.

### Connecting a Retrieval Account

To establish a connection with an external email account, click **New Retrieval Task** . Several pieces of information are required in order for SmarterMail to connect to the account and start retrieving

messages. If these settings are unknown, it's a good idea to contact your IT or Email Administrator with the list below that corresponds to the type of connection you want: POP or IMAP.

### **POP Retrieval**

SmarterMail's POP retrieval service will download email messages from the Inbox of another server via POP3 and deliver them to your SmarterMail mailbox. One primary difference between POP and IMAP is that a POP account will generally retrieve the messages then delete them from the originating server. While SmarterMail's POP Retrieval DOES allow you to leave messages on the server, users need to make sure they enable it. Otherwise, POP retrieval will delete the messages from the server after they are downloaded to your mailbox. The other primary difference is that IMAP allows the retrieval of ALL messages in the external mailbox, while POP will only download the contents from the Inbox.

When creating a new account for POP message retrieval, the following options are available:

- Type - Select either POP.
- Server Address - The address for the email server for which you want to connect. This will most likely be the URL to the mail server. (E.g., mail.example.com).
- Port - The port used to connect to the email server. By default, the port is 110. However, some mail providers may require a separate port be used for POP retrieval.
- Username - The identifier used to authenticate with the email server. This will most likely be the full email address you want to bring into SmarterMail.
- Password - The password used to log into the mail account.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server, either Manual or Automatic. If you choose to manually retrieve messages, you will have to navigate to the External Accounts page, click on the retrieval task, then click Retrieve Messages Now in order to check for new messages. If you choose to automatically retrieve messages, you will not need to return to the External Accounts page, as messages would be automatically retrieved every 10 minutes.
- Destination Folder - The folder where messages from the external account should be downloaded.
- Enable APOP authentication - Select this option if the server requires additional login security.
  
- Leave messages on server - Select this option to keep your messages on the server after they are downloaded to your SmarterMail mailbox.
- Require SSL - Select this option if the connection to the server must be SSL.
- Enable spam and content filtering - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server.



NOTE: After you've added your information, when you click the Save button, the connection is tested prior to actually being saved by SmarterMail. If an error occurs during the test, you will receive a notification that an error occurred and will need to correct it prior to being able to save the connection.

### **IMAP Retrieval**

SmarterMail's IMAP retrieval service will download email messages from another server via IMAP and deliver them to your SmarterMail mailbox. One primary difference between IMAP and POP is that an IMAP account will leave the original messages on the original mail server by default. The other primary difference is that IMAP allows the retrieval of ALL messages in all folders of the external mailbox, while POP will only download the contents from the Inbox.

When creating a new account for IMAP message retrieval, the following options are available:

- Type - Select either IMAP.
- Server Address - The address for the email server you want to connect to. This will most likely be the URL to the mail server. (E.g., mail.example.com).
- Port - The port used to connect to the email server. By default, the port is 143. However, some mail providers may require a separate port be used for IMAP retrieval.
- Username - The identifier used to authenticate with the email server. This will most likely be the full email address you want to bring into SmarterMail.
- Password - The password used to log into the mail account.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server, either Manual or Automatic. If you choose to manually retrieve messages, you will have to navigate to the External Accounts page, click on the retrieval task, then click Retrieve Messages Now in order to check for new messages. If you choose to automatically retrieve messages, you will not need to return to the External Accounts page, as messages would be automatically retrieved every 10 minutes.
- Folder Transfer Method - The method by which SmarterMail imports emails from the server. The advantage of creating an IMAP connection, rather of POP, is that IMAP allows existing folders to be brought into SmarterMail. Users can choose to add their external account folders as root folders or append them as subfolders on an existing SmarterMail folder.
- Requires SSL - Select this option if the connection to the server must be SSL.
- Enable spam and content filtering (Inbox only) - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server.

NOTE: After you've added your information, when you click the Save button, the connection is tested prior to actually being saved by SmarterMail. If an error occurs during the test, you will receive a notification that an error occurred and will need to correct it prior to being able to save the connection.

## Removing a Retrieval Task

To remove a retrieval task, click on the account from the list of retrieval tasks. Then click Delete .

## SMTP Accounts

These days it's rare for someone to have, and use, a single email address. That's why SmarterMail's SMTP Accounts feature is so great: it allows users to send email from another account directly within the SmarterMail Web interface. This means users can add their Gmail, Hotmail, Yahoo! or any other mail account to SmarterMail so that they can send all of their emails, from a number of different accounts, from within a single interface.

A nice complement to SMTP Accounts is Email Retrieval. When used together, users can send and receive email from external accounts directly within SmarterMail.

## Connecting an SMTP Account

To establish a connection with an external email account, click New SMTP Account . Several pieces of information are required in order for SmarterMail to connect to the account. If these settings are unknown, it's a good idea to contact your IT or Email Administrator with the list below.

When creating a new SMTP account, the following options are available:

- Display Name - The name that should appear in the From field of emails sent using this account.
- Server Address - The address for the external email server for which you want to connect. This usually takes the form of mail.example.com.
- Server Port - The port used to connect to the email server. By default, the port is 25. However, some ISPs block port 25 by default. Therefore, it's a good idea to check with your email provider or email administrator to ensure that you're using the proper port for this account.
- Encryption - The type of encryption required by the external email server. Many ISPs and service providers require you use SSL to send emails.
- Email Address - The full email address that corresponds to the external email server. For example, jdoe@example.com.
- Enable Authentication - Select this option if SMTP authentication is required to send mail from this email address. What that means is that, once you attempt to send a message using this account, SmarterMail will pass your credentials back to the sending server to authenticate your address and let the sending mail server know that you're authorized to send mail from that account.
- Username - The identifier used to authenticate with the external email server. In many cases,

this and the Email Address will need to be identical.

- Password - The password used to authenticate with the external email server.

NOTE: After you've added your information, when you click the Save button, the connection is tested prior to actually being saved by SmarterMail. If an error occurs during the test, you will receive a notification that an error occurred and will need to correct it prior to being able to save the connection.

### Removing an SMTP Account

To remove an SMTP account, or to simply reset the connection, click on the account from the list of SMTP Accounts. Then click Delete .

## Synchronized Devices

In the Synchronized Devices section, a user can review the syncing connections that are configured for their account. SmarterMail will show the type of connection being made (generally, the protocol being used) and, in most cases, the device/client and protocol. For example, "Outlook (MAPI)". SmarterMail Enterprise uses multiple data synchronization technologies to sync account data with email clients and mobile devices, including:

- MAPI is an optional add-on that syncs SmarterMail mailboxes with Microsoft Outlook for Windows and that allows Outlook users the same features and functionality that's available within Outlook when using Microsoft Exchange.
- EAS is an optional add-on that is the de-facto standard for syncing SmarterMail mailboxes with most smartphones and tablets.
- EWS is an optional add-on that seamlessly syncs SmarterMail messages, contacts, calendars and tasks to third-party email clients that support the protocol, including Microsoft Outlook for Mac, Apple Mail, the Outlook client for iPad and eM Client.
- CalDAV is an extension of the WebDAV protocol that syncs SmarterMail calendars with Macs, iPads, iPhones, and other devices/applications that use the technology.
- CardDAV is an extension of the WebDAV protocol that syncs SmarterMail contacts with Macs, iPads, iPhones, Thunderbird and other devices/applications that use the technology.

(For more information regarding the different synchronization methods available for SmarterMail and/or your device, please refer to Synchronizing with SmarterMail .)

### Deleting a Connection

In general, users should not delete a sync connection as this may cause the device/application to stop functioning with SmarterMail. Deleting a connection is only recommended if you are no longer utilizing that device or if you are experiencing issues and want to completely resync the device's connection to SmarterMail. When reconfiguring a device's connection, you should: 1.) Remove your

SmarterMail account from the device. 2.) Delete the connection from the Synchronized Devices section. 3.) Add the account configuration back to the device.

## Mailbox Migration

The mailbox migration tool makes moving an account from from an email provider like Office 365 or Yahoo!, or from another email server like MailEnable or Open X-change, to SmarterMail incredibly easy. Depending on whether the provider allows it, Mailbox Migration can import email, contacts, calendars, tasks and notes into a SmarterMail Account.

### Migrating a Mailbox

To import data from a third-party mail server, do the following:

- Log into SmarterMail as a user.
- Click the Settings icon.
- Click on **Connectivity** in the navigation pane. The **Connectivity** page allows you to add cloud file storage providers that you can use to link files from in your messages, you can add SMTP accounts, you can view your connected devices...AND you can migrate messages from third party services or other mail servers into your SmarterMail Account.
- On the Mailbox Migration card, click the Migrate button.
- The Mailbox Migration modal appears. Here, you will select which service or mail server you want to migrate data from. Find your appropriate starting point and click on its icon.
- The information required will vary based on the service or server you're migrating from, and in some cases SmarterMail will know information, such as the Server Address you're migrating from. For example, when migrating from Office.com, you'll simply need your email address and password: SmarterMail fills in the Server Address for you. However, if migrating from another email server, such as MailEnable, you'll need more detailed information. The most information you'll need is:
  - **Items to Migrate** - You'll be able to select what you want to migrate over to SmarterMail: Email, Contacts, Calendars, Tasks or Notes -- or all of them. That said, in some cases you will not be able to choose -- the choice is made for you by the provider. Therefore, this may not always be available, especially if migrating from another mail server like Zimbra or MailEnable.
  - **Server Address** - This will be the URL you use to log in to the mail server, or the mail server address you use when connecting your mail account to an email client. For example, mail.your-domain.com. Whenever possible, SmarterMail pre-fills in the server address to make it easier for you to start the migration.
  - **Type** - This will either be POP or IMAP. The difference is that POP will pull ONLY email

whereas IMAP may be able to pull additional items such as calendars.

- Port - The port that's associated with the Type you've selected.
- Email Address - This is the full email address you're migrating over. For example, `jdoe@office.com`
- Password - This is the password you use to log into the account you're migrating over.
- Require SSL - Enable this if your mail server requires a secured login. In most cases, this should be enabled.
- Delete existing SmarterMail mailbox items - Enabling this will overwrite any existing SmarterMail data with the data that's being migrated over. That includes all contacts, calendar entries, etc. If this is NOT enabled, the migrated data will be "merged" into any existing data in the account and nothing is overwritten.
- Once you've filled out the necessary information, and selected the items you want to migrate over, the mailbox migration will start. You can track its progress as the data is imported. So now, it's a waiting game. The total time necessary to migrate your data depends on how much data there is, your internet connection and other factors.

Note: It may take some time for your mailbox data to import. You can continue using SmarterMail during this time as the migration process happens in the background. In addition, the type of items available for migration are purely dependent upon the service you're migrating from. SmarterMail cannot migrate any item that is not allowed by the service provider.

Our knowledge base offers a couple of different articles that walk through the migration process. Please see:

- [Migrate an Account From Another Service into SmarterMail](#)
- [Migrate a Mailbox From Office 365 to SmarterMail](#)

A few quick notes regarding Mailbox Migration:

- The mailbox migration tool will only transfer email, contacts, calendars, tasks, and notes (if supported) from a single third-party mailbox to your SmarterMail mailbox. System administrators can use mail server conversion tools to migrate multiple mailboxes or entire domains from mail server applications like MailEnable, Merak, MailMax, or Imail quickly and easily. System administrators can also use Web services to run migrations for multiple accounts.
- SmarterMail is typically able to keep date and time stamps when importing from other email server as long as they follow the standard time and date format in the email header. In addition, it may be necessary to make changes to your account, especially if you're importing data from services like Office365 or Yahoo! to allow for mis-named "insecure applications". So, be sure to make any necessary security changes to your account BEFORE you start the migration process.

- There may be a discrepancy in the number of items in the Deleted Items folder after a migration. This is because some email providers, notably those made by Microsoft, don't restrict the type of item that gets stored in Deleted Items. For example, in your Office.com account there may be contacts, calendar appointments, notes, and tasks in Deleted Items. SmarterMail only allows mail messages in Deleted Items, we do not import other item types during a migration.
- Finally, if there are issues with a migration, SmarterMail logs all migration activity. Therefore, a System Administrator can check the Mailbox Importing logs for an account to see what happened, and find a resolution.

## Content Filtering

Content filtering is a great way for System Administrators, Domain Administrators and/or Users to perform actions on incoming emails that meet specific criteria. For example, it's possible to use content filters to delete messages with certain attachments (e.g., attachments with a .exe extension), forward messages from a specific email address to another account, move messages to a certain folder or even alter the subject of a message by appending something to it prior to delivery. While content filters are most commonly used to organize email by moving messages to specific folders, they're extremely flexible and allows you to filter messages the way you want to.

Content Filtering is available to Users and Domain Administrators in the Settings and/or Domain Settings areas. System Administrators have a Content Filtering tab available to them for each domain that's managed on the SmarterMail server. In both the Settings and Domain Settings areas, there is a Content Filtering option in the navigation menu that's used to see any existing filters as well as to manage filters. That being said, the filters created are only viewable/editable by the role that created them. That means the domain content filters are only available to Domain Administrators and Users see their own filters. However, any filter created for a domain by a System Administrators is available to both the System Administrator and the Domain Administrator.

Once the Content Filtering section is accessed, any existing filters will be listed. Content filters run in order, from top to bottom. In addition, content filters run from top-down: that means that content filters created by System and/or Domain Administrators run first, then filters created by users. That means that if a message could be managed by more than one, it will be handled by the FIRST content filter encountered. So, if you're seeing weird or unexpected behavior for messages, you may want to re-organize the order of your filters. You do this by moving them by clicking the Up and Down arrows next to the content filter names, moving them up and down in the "order of operations." You may also want to contact your Domain Administrator to see if they have any content filters created that could be impacting message delivery.

To delete a content filter, simply select it from the list and click the Delete button.

- Create/Edit Content Filters - Create or modify filters for incoming messages
- Run Filters - Trigger content filters to run on-demand

## Create/Edit Content Filters

To add a new content filter, click New . The following options will be available:

### General

- Name - The friendly name chosen to describe the rule.
- Match Type - Because multiple conditions can be configured per content filter, SmarterMail provides the option to require ALL conditions to be met or ANY of the conditions to be met in order for the rule's action to be triggered. Select the appropriate option from this list.
- Enable wildcards in search strings (\* and ?) - Wildcards can be used to replace a specific word, phrase or character, where a question mark (?) represents a single character and an asterisk (\*) represents any text. For example, if you wanted to block sales01@domain.com, sales02@domain.com and sales03@domain.com, you could enter sales??@domain.com . If you wanted to block all sales addresses, you could enter sales\* instead.

### Conditions

Click on New Condition to specify the criteria that triggers the rule's action(s). For each condition selected, you will be able to add specifications and enter any necessary details, as required. For example, if you choose to filter on 'From Address', you can enter one or multiple email addresses. If you choose to filter on 'Contains specific words or phrases', you can enter the specific text and choose to look for that text in an email's subject, message body, header, etc.

On many conditions, you also have the ability to reverse the logic of the criteria item by changing the Comparison selection. For example, imagine you only want to accept email from specific domains. You would choose the 'From specific domains' condition and set the Comparison field to 'Does Not Match'. Any messages sent from domains that do not match what you've entered in the text box can be deleted.

Note: If you select a condition that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following conditions are available, separated by Condition Type:

From Address

- From specific addresses
- From specific domains
- From trusted senders

#### Contains Specific Words or Phrases

- Subject
- Body
- Subject or Body
- From Address
- To Address
- Email header
- Anywhere in message

#### To Address

- To specific addresses
- To specific domains
- Only to me
- My address in to field
- My address not in to field
- My address in to or cc field

#### Attachments

- Has any attachment
- Specific filenames
- Specific extensions
- Over specific size

#### Other

- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated
- Message over size
- Message under size
- Received in date range



- Sent through a specific server (by IP address)
- Spam probability

## Actions

Click on New Action to specify what should occur when an email triggers the content filter condition(s). Note: If you select an action that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following actions are available:

- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: Messages deleted through content filtering cannot be recovered.
- Reroute message - Forwards the message to another email address. Unlike 'Forward message', this option will not store a copy of the email in your own account.
- Bounce message - Sends a message back to the sender of the email saying that the message was bounced. Note that the message is still delivered to you unless you choose to delete it as well. Note: If the system administrator has disabled bouncing, this option will function the same as the delete action.
- Move message - Delivers the incoming message to the folder you choose from the dropdown list. Note: If you later delete that folder and leave the content filter active, the filter will automatically create the folder when the action is triggered.
- Add Header - Adds an email header within the incoming message, which can be useful when performing additional filtering through Outlook or another email clients. Headers should be formatted like "X-someheadername: value"
- Add Text to Subject - Appends a prefix to the subject line of the email. This is useful for categorizing emails as the subject line will be altered to include the text you specify in the text box.
- Forward message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- Mark as read - Automatically marks the messages as read, which means it will not show up in your inbox, or any other folder, as unread.
- Set Priority - Automatically elevates the priority of a message. For example, if you create a content filter that flags a message from a VIP, you may want to set the priority of the message to High as well to denote its importance.
- Flag message - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.

## Run Filters

Users can manually trigger one or more of their content filters to run against a specified email folder. The ability to run content filters on-demand is a convenient way to clean up the mailbox, as actions can be performed on EXISTING emails rather than incoming email only.

To retroactively perform filter actions on an email folder, use the checkbox to select the filters that should be triggered. Then click on the Run Filters button. In the Run Filters modal, choose the folder that should be processed and click OK. The filtering process may take some time to complete, but you may continue to work while the process runs in the background. When the filtering process has completed, an Action Succeeded toast notification will appear within the Email section.

Important notes regarding on-demand filters:

- The 'Sent through specific server (by IP address)' and 'Sender Authenticated' conditions as well as the 'Bounce message' action cannot be used when manually running a content filter. If a filter contains one of the restricted actions or conditions as its only action or condition, the filter should be triggered manually. If a filter contains one of the restricted actions or conditions along with other actions or conditions, please note that the restricted action or condition will be omitted from the filter process.
- The 'Delete message' action will immediately purge the email from the system. Without Message Archiving enabled, these messages may not be recoverable.
- The 'Reroute message' action will delete the original copy of the email from your mailbox and forward it to the specified address. The From address of the forward will be the original sender.
- The 'Prefix Subject' action must re-write the message. It will attempt to timestamp the new message with the date from the message header. However, if the date cannot be parsed from the message header, the re-written message will show the current time.
- The 'Trusted Senders' condition will look for CURRENT trusted senders. It cannot look for messages from trusted senders that were configured at the time the message was delivered.
- Running content filters on-demand executes the filters in the order they appear. However, the on-demand process does not loop through messages multiple times to perform the filter actions. Instead, it will gather all of the actions it could run on the message first and then runs them in the order they would have been found.
- When there are multiple actions for one filter, the actions that don't require a re-write of the message will be done first. For example, a message will be marked as read before it is moved to another folder.

## Events

The Event system in SmarterMail is an incredibly powerful and flexible tool that allows users to automatically perform actions based on specific criteria and remain up-to-date with what is going on with the SmarterMail server. SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to users that need the information. For example, users can automatically add an additional recipient on messages they send or receive notifications when a task is due or their user disk space has met a certain threshold.

To create or view your account events, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Events in the navigation pane. To create a new event, click New . The following options will be available:

### General

- Event Name - The friendly name of the event.
- Event Status - New events default to a status of Enabled. However, to temporarily stop an event from triggering, you can change the status to Disabled.
- Event Category - The feature to which the event pertains: Email, User or Collaboration.
- Event Type - The occurrence that triggers the event. Each category has several specific event types that can trigger the action.
- User - The user that the event applies to.

### Event Categories and Types

Below is a list of the Event Categories, and the Event Types that are available for each, for User Events:

#### Email

- Message Received
- Message Sent

#### User

- User Disk Space Used

#### Collaboration

- Calendar Reminder Occurred
- Task Reminder Occurred

## Conditions

Each event type has its own corresponding conditions. The global conditions that are seen across all event types are listed below. Multiple Conditions can be used when creating a given Event. Conditions are checked in order, from top to bottom, before the Action(s) is/are performed.

- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.

Below are the Event Conditions that are available and their respective Conditions:

### Email

- From Address - The email address from which the email message was sent.
- From Domain - The domain from which the email message was sent.
- To Address - The email address the email message is being sent to.
- To Domain - The domain to which the email message is being sent.
- Subject - The words that will trigger the event if found within the subject of the message.
- Size (KB) - The message size in KB that will trigger the event.
- Intra Domain - Select this option to trigger the event when an email is sent/received from within the domain.
- Spam Level - The spam level of the message -- usually Low, Medium or High.
- Messages an Hour - The total number of email sent in an hour.

### User

- Domain - The domain on which the event occurs.
- Full Name - The full name of the person that will trigger the event.
- Mailbox Usage (%) - The percentage of mailbox space utilization that will trigger the event.
- Mailbox Usage (MB) - The mailbox space utilization in MB that will trigger the event.
- Username - The username that will trigger the event.

### Collaboration

- Subject - The words that will trigger the event if found within the appointment or task subject.
- Location - The appointment location that will trigger the event.
- Description - The words that will trigger the event if found within the appointment or task description.
- Email Address - The email address that will trigger the event.
- Priority - The Priority level assigned to a Task.
- Percent Complete - The percentage complete the Task is.
- Status - The Task's status.

## Actions

Each event type has its own corresponding actions. The global actions that are seen across all event types are listed below. Multiple Actions can be assigned to a given Event. Actions are performed in order, from top to bottom.

- Send a notification - This option will send a notification to the Notifications window. It can also send a popup browser notification and an email.
- Send an email - This option will send an email to the specified address.
- Add Recipient - Adds a recipient to the message. (For Email Event Category Only)

## Mailing Lists

As a SmarterMail User you may be tasked with becoming a "List Administrator". What that means is that you're the person who manages a mailing list for your organization. Therefore, it's your job to get the set up the mailing list, manage subscribers, manage who can post to the list and much more. If you do become a List Administrator, the Mailing Lists tab in your Settings is where you go to work on those lists.

To access your mailing lists, log into SmarterMail and navigate to the Settings section. Then click on Mailing Lists in the navigation pane. If you've been assigned a mailing list, or multiple mailing lists, they'll be displayed on this page with following:

- List Name - The name of the mailing list.
- List Administrator - The List Administrator's Display Name. As you're managing the lists, this should be you.
- Subscribers - The total number of subscribers for the mailing list.
- Digest Subscribers - The total number of digest subscribers for the mailing list.

## Managing Mailing Lists

As a List Administrator you have full control over the various settings for the list, or lists, you manage. To see these settings, simply click on the list you want to manager and it's options will open.

For information on the tabs listed and the options available, see the information below:

- Options - Configure the mailing list options and permissions
- Subscribers and Digest Subscribers - Add subscribers who will receive the standard mailing list postings or digest emails.
- Posters - Whitelist email addresses or domains who can post to the mailing list
- Banned Users - Prevent specific email addresses or domains from posting to the mailing list
- Messages - Configure the header and footer for postings as well as the replies sent to listserv

commands

- Custom Fields - Customize list postings with subscriber custom fields

## Sharing Resources: Contacts, Tasks, Calendars, Notes and Email Folders

SmarterMail gives users the ability to share several things with other people within their organization. This includes primary resources as well as secondary resources. For example, SmarterMail creates default calendars, contact lists (address books), task areas and more. These can be shared, but any new "folder" you create -- a new calendar, a new tasks area, etc. -- can also be shared, all on its own. For email folders, parent folders can be shared along with any sub-folders created within the parent, or individual child folders can even be shared individually. This all makes collaborating with co-workers within your organization extremely simple, as well as extremely flexible.

When synchronizing your account to a mobile device, or some desktop clients, using protocols such as EAS and EWS, shared items can be available on those devices and in those clients. Each device and client acts a little differently, however, so not every shared resource may be available to you due to limitations of the device/client or even a limitation of the protocol being used. For example, when using the Gmail client on an Android device, there's no way to get shared Tasks. In addition, some clients act differently based on the type of permission given to a shared item. Generally, shared items will synchronize if the item is shared with Full permissions, as opposed to Read Only or Availability. Clients such as eM Client and Outlook generally reject any share with any other permission type.

The following areas can be shared with other organizational members:

- Email Folders - parent folders as well as child (sub) folders
- Calendars - primary and secondary
- Contact Lists / Address Book - primary and secondary
- Tasks - primary and secondary
- Notes - primary and secondary

That leaves areas like Team Workspaces, News feeds and File Storage as the only areas without traditional sharing options. However, both Team Workspaces and File Storage are collaborative by their very nature. So, they can be "shared", just not the same way as contacts, tasks, etc.

### How to Share

There are a couple of different ways to share items: from within an area itself or from the Shared Folders area of your user settings. One of the important things to know about sharing is that when you either initiate a share with someone, or revoke that share, those actions are automatic. That means that the other person -- or those other people -- don't have to do anything. They will either see the shared

item or it will be removed. The same holds true when something is shared with you, or if that share is revoked: it will simply appear or disappear.

## Sharing an Individual Item

Whether you're sharing a calendar or a task list, the process is essentially the same. The only real difference is that SmarterMail allows you to share individual email folders versus calendars, task folders, etc. which are, essentially, all-or-nothing shares as there aren't sub-anything in those areas. Therefore, an email folder requires a user to right-click to pull up a context menu that offers options whereas a calendar, say, will automatically open that calendar's options when you click on it directly. This latter action is the same for Tasks, Notes and Contacts.

Regardless of how you get to a folder's sharing option, you're presented with the following:

- **Users** - This area allows you to share the item with one or more user, and each user you add to the share can have their own permission level. These are:
  - **None** - This permission acts as a "negater" and is, therefore, only available for users. For example, let's say you have a user group set up for your Marketing Department. However, you don't want to share Notes with Henry because he ate your piece of cherry pie last week. You add Full Control access to the Marketing Department user group, you'd add Henry's username under Users and set his access to "None". That way, you're sharing Notes with everyone in Marketing EXCEPT Henry as you've negated his permission.
  - **Availability** - Used exclusively for calendars, this permission means that the user with this permission can see whether a person is available for scheduling purposes, but it doesn't allow for the viewing of a calendar or its appointments/events.
  - **Read-only** - This means that the user can only view the items in the share (calendar entries, contact lists, etc.), they have no control over editing entries, adding entries, etc. A read-only share would be good, say, for a colleague who needs access to a contact list, but who doesn't need to manage those contacts in any way.
  - **Full Control** - This access allows others to add, edit and/or delete any items within the share. Basically, they use whatever is being shared just as if it were their own.
  - **User Groups** - This area allows you to share the item with groups of users that have been set up previously. When sharing with a User Group, the same permission levels are available EXCEPT for None as that is a user-only permission.

## Using the Sharing Area

Another way to share items is using the Sharing area. You access this area by going to Settings > Sharing. You'll notice this area separated into 2 different tabs: Shared with Me and Shared with Others.

## **Shared with Me**

This tab displays all the items that have been shared with your user. This includes email folders and sub-folders, contact lists, tasks and notes. This tab displays the following:

- Shared By - The user sharing the item with you.
- Folder - The name of the "folder" that's been shared. This is, essentially, the name of the shared item. (E.g., Conference Room A)
- Type - The type of shared item: calendar, email folder, notes, etc.
- Attached - This indicates whether the item is actually attached to your user. If it's not attached, it can't be accessed.
- Subfolders - This indicates whether the subfolders within the parent are also shared with you.
- Permissions - The permission level you have for the shared item. (E.g., Read-Only)

Clicking on an item in the Shared with Me list opens the details of the item. You can see the name, who shared it and the permission for the item. In some cases, there are also customization options and additional information that may be available. For example, on calendars you can adjust the color of the calendar items to customize how they appear. In addition, for WebDAV items (calendars and contacts), you have the CalDAV or CardDAV link displayed. Finally, you can attach or detach the share from within the modal window. You can also attach or detach items simply by checking the box next to the item, then clicking the appropriate button at the top of the content window.

You'll also notice "Attach" and "Detach" buttons. While shares are automatic, you may have need to remove, or Detach, a shared item, for one reason or another. For example, if your CEO's calendar was shared with you, but you need to show your calendar to someone -- a client, possibly -- you may want to temporarily detach the CEO's calendar from yours so no sensitive information is displayed. In this case, you'd select the CEO's calendar and click the Detach button. Then, once the prospective client leaves, you'll want to select that calendar and click the Attach button. The key here is that you've removed the share, but the CEO hasn't. Therefore, the calendar is still shared with you, it's just been temporarily detached.

## **Shared with Others**

This tab displays the items you have shared with others within your organization. It offers similar information as the Shared with Me tab, including:

- Folder - The name of the "folder" that's been shared. This is, essentially, the name of the shared item. (E.g., Conference Room A)
- Type - The type of shared item: calendar, email folder, notes, etc.
- Subfolders - This indicates whether the subfolders within the parent are also being shared.



- Permissions - The permission levels associated to the share. This is an indication of how many users and/or user groups the item has been shared with.

Clicking on an item opens its options. This allows you to modify the share by adding in additional users, changing permissions for existing users and/or user groups, etc.

It's also possible to create a new shared item from the Shared with Others tab. Simply click the New button at the top of the content pane. This opens a new modal and offers the following options:

- Folder - The type of share you want to create, based on the "folder", or item, you want to share. All of the items you have available to be shared are listed in this dropdown: all calendars, all email folders, all address books, all notes and all tasks.
- Users - This area allows you to share the item with one or more user, and each user you add to the share can have their own permission level. These are:
  - None - This permission acts as a "negater" and is, therefore, only available for users. For example, let's say you have a user group set up for your Marketing Department. However, you don't want to share Notes with Henry because he ate your piece of cherry pie last week. You add Full Control access to the Marketing Department user group, you'd add Henry's username under Users and set his access to "None". That way, you're sharing Notes with everyone in Marketing EXCEPT Henry as you've negated his permission.
  - Availability - Used exclusively for calendars, this permission means that the user with this permission can see whether a person is available for scheduling purposes, but it doesn't allow for the viewing of a calendar or its appointments/events.
  - Read-only - This means that the user can only view the items in the share (calendar entries, contact lists, etc.), they have no control over editing entries, adding entries, etc. A read-only share would be good, say, for a colleague who needs access to a contact list, but who doesn't need to manage those contacts in any way.
  - Full Control - This access allows others to add, edit and/or delete any items within the share. Basically, they use whatever is being shared just as if it were their own.
  - User Groups - This area allows you to share the item with groups of users that have been set up previously. When sharing with a User Group, the same permission levels are available EXCEPT for None as that is a user-only permission.

As you can see, the process for sharing contacts, calendars, tasks and even email folders is essentially the same and relatively simple: you select the item you want to share, add the users and/or user groups you want to share to, and set the Access permissions for each. Once you've saved your settings, the people you've shared with will have those items automatically mapped to their users.

## Signatures

An email signature is a block of text automatically appended at the bottom of an email message. Signatures may contain the sender's name, address, phone number, disclaimer, or other contact information. In addition, SmarterMail allows users to create HTML formatted signatures that can include stylized text, links, images, etc. For example, a signature can contain a company logo and tagline, an image that links to a personal or business social media account, or even links to other properties, like a company's help desk or management interface.

There are a couple of different pieces to using custom signatures:

- Creating the actual signature, and
- "Mapping" that signature to the account, or accounts, that should use it.

To access your signature settings, log into SmarterMail and navigate to the Settings section. Then click on Signatures in the navigation pane. The following settings will be available:

## Signatures

To create a new signature, click the New Signature button. Then enter a friendly name and the content that should be appended to each message. Using the Custom Variables button, you can add variables that will pull in account information or other details, such as the current date, your display name, website, etc.

## Mapped Field

Use this card to assign a signature to your mailbox and any SMTP accounts, email aliases or domain aliases that have been configured for your account. Note: Domain Administrators can enforce signatures on a domain-wide basis for user accounts, domain aliases and email aliases. In such cases, you may not be able to map a signature to these addresses.

Note: If multiple signatures are available, you can manually adjust the signature used when composing an email via webmail.

## A Practical Example: Adding an Image

How to add an image to a signature is, believe it or not, one of the most common questions we get from users. It's actually a pretty easy thing to do, and there are a few different ways to do it:

- Add an image to your Profile -- Do this by going into your Profile, and clicking on the image box next to your display name. You can upload an image -- a logo, a headshot, etc. -- and then use that image as part of your signature using the `#ContactPicture#` variable.
- Edit the HTML to insert an image -- The HTML editor gives you the ability to edit the HTML

code that's generated when you create a signature. You do this by first clicking the + sign to expand all of the HTML editor tools, then clicking on the "View Code" button, which is a sheet of paper with these symbols on it: `<>`. Once you see the HTML for your image, you simply edit it to add an `<img src="">` that points to the location of the image. (E.g., [https://www.smartertools.com/images/email/temp\\_2010/twitter\\_icon.png](https://www.smartertools.com/images/email/temp_2010/twitter_icon.png)) The image can be hosted on your website or via a third-party image hosting service such as Imgur.

- Use a third-party service -- This is a bit of a different approach, but there are services out there that allow you to create very intricate and dynamic email signatures. These signatures, then, can be added using the HTML editor or even added as signatures in email clients. There is some debate about the efficiency, much less the necessity, of doing this, but the services are out there and they are an option for you.

Regardless of how you choose to do it, adding an image to your signature is not only easy, it adds a bit more personalization to your messages.

## Spam Filtering

SmarterMail includes a variety of antispam measures that will help keep a user's inbox free of unwanted mail. In the Spam Filtering section, users can review/configure the spam filtering options and trusted senders for their account. To access the spam filtering configuration, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Spam Filtering in the navigation pane.

In most cases, a System or Domain Administrator has already configured the filtering options for spam messages on your domain. However, if they allow it, you can override those settings to select your own options for filtering out potentially unwanted email.

### Options

- Override spam settings for this account - Enable this setting to customize the way spam is handled and to override the settings created by the Domain Administrator. If this option is disabled, the domain's default spam filtering policy will be displayed and cannot be edited.

When you override the spam options set by your Administrator, you can choose the actions that are taken when email comes in that has a low, medium, or high probability of being spam. For each spam level, choose the action you wish to have taken. If you choose to add text to the subject line of messages, type the text in the box below the action drop down.

## Trusted Senders

Users can add specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. This lets the system know that these messages come from a trusted source and can prevent mail from friends, business associates and mailing lists from being blocked or sent to the Junk Email folder. By default, every contact in a user's Contacts list is considered a trusted sender and bypasses spam filtering.

Note: If SPF and DKIM spam checks are enabled, SmarterMail will run those checks on ALL emails, including those from trusted senders. Because anyone can write any return path that they want when sending a message, this extra check helps prevent spammers from flooding users with hundreds of messages that aren't truly from a trusted sender. If the SPF and DKIM weights on a message from a trusted sender meet the Low, Medium or High spam filtering threshold, the corresponding spam filtering action (Move to Junk Email Folder, Delete Message, Add Text to Subject) will be performed on that email, despite the email coming from a trusted sender.

When entering trusted senders or domains, enter only one item per line break.

## Blocked Senders

Users can add specific accounts to their Blocked Senders list. For example, if you receive a message from `dan@im-a-spammer.com`, you can left click on the email address in the message view and select "Block Sender" from the context menu. When you do this, that message, and any future message from that specific sender, will have whatever Action is set on the Blocked Senders card applied. This allows users to have a bit more granular control over senders that escape whatever spam filtering the system administrator has set up. NOTE: Any Action set on the Blocked Senders card are applied just for the user who sets them -- these Actions are not domain-wide or system-wide, they are only applied for the specific user who creates them.

As for the Actions themselves, they include:

- None - Nothing happens to the messages from Blocked Senders.
- Move To Junk Email Folder - Messages are moved to the Junk folder, then handled however items in that folder are handled. (E.g., auto-clean rules.)
- Move To Deleted Items Folder - Messages are moved to the Deleted Items folder, then handled by whatever rules apply for that folder. (E.g., auto-clean rules.)
- Delete - The messages are flat out deleted and, therefore, unrecoverable.

Any address that has been marked for blocking will appear in the Blocked Senders list. Clicking the pencil icon allows users to review and possibly edit the list of senders they have blocked. Users can also manually enter addresses rather than simply using the context menu from their message view.

## Domain Settings

### Accounts

#### Users

This settings page is only available to Domain Administrators.

The Users section is where a Domain Administrator can manage the user accounts on their domain. This document explains the actions that can be taken on user accounts, including the ability to import users, improve the search functionality for a user by reindexing their account, enabling or disabling the MAPI/EWS and/or EAS synchronization add-ons, and more.

More information is available for adding new users as well as Managing Users .

To access the Users section, log in to SmarterMail as a Domain Administrator and click on the Domain Settings icon. Then click on Accounts in the navigation pane. The Users tab will load by default.

Jump To:

- Adding new users
- Import from CSV - Import new user accounts from a CSV file.
- Import from LDAP - When enabled, this allows a Domain Administrator to import new user accounts from Microsoft's Active Directory.
- Export All to CSV - Export a CSV file of all users on the domain.
- Reindex - Reindexes users/accounts to improve the search functionality for a user by reindexing their account.
- Refresh Disk Usage - Recalculate the disk usage for one or more user accounts.
- Expire Password - Force a user to change their password on their next webmail login.
- Enable EAS - This will give the selected User(s) the ability to set up Exchange accounts on mobile email clients, contacts and calendar apps, etc.
- Disable EAS - This removes the EAS capabilities for the account(s).
- Enable MAPI/EWS - This will give the selected User(s) the ability to set up Exchange accounts in Microsoft Outlook for Windows, Outlook for Mac, Apple Mail and will sync the account to eM Client.
- Disable MAPI/EWS - This removes the MAPI/EWS capabilities for the account(s).

## Users

The Users tab lists all users created on the domain, as well as some basic information about each user.

This information includes:

- Account - The username, or name that appears to the left of the "@" symbol in the email address.
- Name - The Display Name set for the User.
- Type - The "Role" of the User: User, Domain Admin or Primary Admin.
- EAS - Whether or not the EAS add-on is enabled for the User. If there is a checkmark here, this add-on is enabled.
- MAPI/EWS - Whether or not the MAPI/EWS add-on is enabled for the User. If there is a checkmark here, this add-on is enabled.
- Enabled - Whether the User is allowed to send/receive email (Enabled) or not.
- Last Login - The last date and time the User logged in to webmail.
- Disk Usage - The total amount of disk space being used versus their limit.

In addition, each User has a series of actions that can be performed. These are available by clicking on the Actions (...) button and include:

### Import from CSV

To add new SmarterMail users via a CSV spreadsheet, click on the Actions (...) button then click on Import from CSV . Upload the CSV file that contains the user information and click Next . The first page of the import modal will allow you to map the CSV column headers to the appropriate configuration option within SmarterMail. For example, if your CSV contained a column header for "user name", you can select the "Username" mapping.

At minimum, the CSV file must contain a "Username" column header. All remaining account configuration options will mimic the domain's User Defaults template. If no "Password" column header is provided in the CSV, the import modal will prompt you to create a temporary password for the user(s) being imported. Those users will be prompted to change their password the next time they log into the webmail interface.

### Import Users From LDAP

This feature is only available to Domain Administrators using SmarterMail Enterprise.

The Lightweight Directory Access Protocol (LDAP) is an Internet protocol that email servers and other programs use to connect to, and look up information from, a server. In SmarterMail, LDAP is most commonly used for integrating SmarterMail with Microsoft's Active Directory.

Follow these steps to import new users using LDAP:

- Log into SmarterMail as the domain administrator.
- Click on the Domain Settings icon.
- When the domain settings load, click on Accounts in the navigation pane. All existing accounts will load in the content pane.
- Click the Actions (...) button.
- From the dropdown menu, click Import from LDAP . A modal will appear.
- Input the location of your active directory users via the LDAP binding string. An example LDAP string might look like this:

```
LDAP://testdomain.local/CN=Users,OU=Company,DC=testdomain,DC=local
```

- If you want to use the LDAP email address as the username for the imported accounts, enable it.
- Click List Users .
- Select the users you wish to import into the domain. NOTE: If any users, aliases or mailing lists already exist in SmarterMail they will not show up in the LDAP list.
- Click Import to begin the import process.

Note: LDAP integration will only function if SmarterMail is on the same domain as the LDAP server you are trying to connect to.

## Export All to CSV

To export a list of all user accounts on the domain, click on the Actions (...) button then click on Export All CSV . The CSV file will contain a variety of details about the user accounts, including their username, display name, authentication method, home and work address, disk usage, and more.

## Reindex

If a user reports errors or a lack of results when performing a search, it may be necessary to reindex their user account, which will regenerate the mailbox index file. To reindex one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Reindex .

## Refresh Disk Usage

This option can be used to recalculate the disk usage for the selected user(s). If you find discrepancies in the user's disk usage display throughout the various areas of the interface (in the email section, reports, or Users grid), use this option to recalculate and correct that display. Please note that there may be no visual effect if the disk usage numbers shown were already correct. To refresh the disk

usage for one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Refresh Disk Usage .

## **Expire Password**

This option can be used to expire the password of one or more users, forcing the user(s) to change their account password the next time they log into the webmail interface. To expire the password of one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Expire Password .

Note: If password changes were disabled for a user, expiring the user's password will automatically enable password changes and expire their password. They will be required to set a new password next time they log in. In addition, accounts set to Active Directory authentication cannot be expired.

## **Enable/Disable EAS**

EAS is the industry standard for synchronizing mobile devices to SmarterMail, in addition to some desktop email clients. It uses direct push technology to sync email and collaboration items to variety of mobile devices, including smartphones and tablets, as well as Windows Mail, which ships as part of Windows 10.

If a Domain Administrator is given the ability to manage EAS mailboxes -- that is, add and remove EAS functionality for Accounts -- then these options will be available once a account, or several accounts, are selected.

## **Enable/Disable MAPI/EWS**

MAPI is Microsoft's "Outlook protocol". That means it is the foundation by which Outlook on Windows does things like share tasks, calendars and email folders; set up meetings; create contact groups and much more. EWS is a similar protocol, but one that was developed specifically for integration with the Apple ecosystem. While other, non-Mac email clients have adopted EWS (e.g., eM Client), it primarily works with Outlook for Mac and Apple Mail.

What makes SmarterMail's use of MAPI different than its competitors is that SmarterMail has native, server-level integration of MAPI, just like Microsoft Exchange. Other products use separate pieces of software that are installed on client machines to "emulate" Exchange functionality. These "Outlook Connectors" don't provide the full suite of Exchange features to Outlook. In addition, they're another piece of software that a client has to install, and that mail administrators or IT staff have to manage.

If a Domain Administrator is given the ability to manage MAPI/EWS mailboxes -- that is, add and remove MAPI/EWS functionality for Accounts -- then these options will be available once a account, or several accounts, are selected.



## Managing Users

This settings page is only available to Domain Administrators.

The Users section is where a Domain Administrator can add, view and modify the user accounts on their domain, where each account represents a person's actual mailbox and email address (ex: `jdoe@example.com`). Domain Administrators can modify basic configuration options for a user, including their password method, features they can access, reply-to addresses, webmail preferences and more.

For a better understanding of the actions that can be performed in the Users section, see the [Users Overview](#) page.

To access the list of users on your domain, log in to SmarterMail as a Domain Administrator and click on the Domain Settings icon. Then click on Accounts in the navigation pane. The Users tab will load by default.

Jump to:

- [Account](#)
- [Service Access](#)
- [User](#)
- [Webmail](#)
- [Forwarding](#)
- [User Groups](#)
- [Throttling](#)

### Account

- **Username** - The identifier the user uses to login to SmarterMail. To change an account's username, click on the Actions (...) button and then **Rename** .
- **User Status** - Domain administrators can change the status on a mailbox to limit a user's access as needed. For example, if a user leaves the company, either voluntarily or not, a domain administrator can suspend the account pending further review by company management.

Options include:

- **Enabled** - The mailbox is in use by the user.
- **Disabled and allow mail** - The mailbox continues to receive email but the user is unable to access their mailbox.
- **Disabled and don't allow mail** - The mailbox no longer accepts incoming messages and the user is unable to access their mailbox.

- Display Name - The friendly name that is displayed on outgoing messages.
- Authentication Mode - The authentication method used to login: SmarterMail or Active Directory. To change a user's password when using SmarterMail verification, click on the Actions (...) button and then Change Password . When using Active Directory, changes to a user's password must be done in the directory itself.
- Active Directory Username - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Active Directory username to authenticate against for Active Directory authentication.
- Domain - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Domain to authenticate against for Active Directory authentication.
- Mailbox Size Limit - The maximum size of the mailbox. By default, the maximum mailbox size is 100 MBs. However, domain administrators can change this to whatever they like to correspond to company limits. For unlimited disk space, type in 0.
- Domain Administrator - Enable this setting to make this user one of the Domain Administrators for the domain, which allows the user to create new users and edit domain-wide settings.

## Service Access

This card can be used to adjust a user's access to the standard protocols that SmarterMail utilizes. For example, you can limit services like POP, IMAP and SMTP so that specific users are not able to connect their email accounts to external email clients. The following services can be managed for each user:

- Webmail - Enable this option to allow users to log into SmarterMail from the webmail interface.
- POP - Enable this option to allow the user to download mail to an email client using POP3.
- IMAP - Enable this option to allow the user to create a two-way email sync between SmarterMail and an email client using IMAP.
- Inbound SMTP - Enable this option to allow users to receive email from external domains.
- Outbound SMTP - Enable this option to allow users to send email to external domains.
- Chat (XMPP) (Enterprise Only) - Enable this option to activate SmarterMail's included Group Chat feature for Users.
- External SMTP Accounts - Enable this option to allow users to send email from a third-party mail server account right from within SmarterMail. For example, if a user has a second email address that they regularly use, enabling this option would allow the user to set up an SMTP Account for that address and choose which account to send from when composing new messages.
- EAS (Enterprise Only) - This will give the users the ability to set up Exchange accounts on

mobile email clients, contacts and calendar apps, etc.

- MAPI/EWS (Enterprise Only) - This will give the User the ability to set up Exchange accounts in Microsoft Outlook for Windows, Outlook for Mac, Apple Mail and will sync the account to eM Client.

## User

- Time Zone - The time zone to use for marking the sending and receiving date and time.
- Reply-to Email Address - The email address used in the reply-to header of messages sent through webmail. This address will be used by receiving email clients when replying to a message.
- Recovery Email Address - The email address to which password reset instructions will be sent if the user forgets their account password. This address should be separate from the SmarterMail account, such as a Gmail or Yahoo! address, or even the default email address of a Domain Administrator. Note: The backup email address can only be used if the System Administrator has enabled password retrieval for the login page. If the account is protected by 2-Step Authentication, this address may also be used to retrieve the 2-Step verification code.
- Plus Addressing - Plus addressing allows users to automatically sort incoming email without creating content filtering rules first. A major benefit of plus addressing is that it allows users to generate special email addresses if they do not want to give out their real address. For example, if user@example.com needs to provide a valid email address to sign up for a newsletter, he can sign up for the newsletter using the following address: user+technewsletter@example.com. When the newsletter is delivered, it can automatically be routed to the Technewsletter folder. If the folder does not already exist, it can be created automatically. Note: For plus addressing to work, the plus (+) sign is required AFTER the username but BEFORE the domain name. For example, username+foldername@domain.com.
- Disabled - Select this option to turn off plus addressing for the account.
- Move to Folder - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, it will be created automatically. Note: To prevent abuse, no more than 10 folders can be auto-created in this method during a six hour period.
- Move to Folder (If Exists) - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, the email will be placed in the Inbox.
- Leave in Inbox - The incoming message will be placed in the Inbox.
- Calendar Auto-Clean - SmarterMail allows domain administrators to keep users' past calendar events from cluttering up calendar views. By default, this is set to Domain Default, which follows the policy set by the Administrator for the domain. However, you can adjust this policy per user, as needed.
- Disable password changes - Select this option to prevent the user from changing the login

password. This setting overrides the password expiration found in Security settings. A user's password will not expire or be required to be changed if this setting is enabled.

- Show in Global Address List - This setting is enabled by default and allows the user account to be displayed in the Global Address List, which is found in the Contact section. This option is useful for only displaying accounts that are tied to real people as opposed to addresses used by departments, such as support@example.com. Note: This option is only available when using SmarterMail Enterprise.

## Webmail

- Delete Email Action - To specify the action performed on deleted messages, select the appropriate action from the list. NOTE: This action only affects messages. If folders are deleted, the folder and its contents will always go to the Deleted Items folder.

- Move to Deleted Items folder - Deleted items will appear in the deleted items folder, which will need to be regularly emptied.

- Permanently Delete - Permanently deletes the message. Note: When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.

- Mark as Deleted - Flags the message for deletion, but it does not move messages to the Deleted Items folder and messages remain until the folder is purged.

- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list. By default, SmarterMails sets the encoding to Western European (ISO). However, SmarterMail supports encoding for over 35 different text formats, thereby supporting encoding for most parts of the world.

- Compose Font - Specify the default font for emails by selecting an option from the list.

- Font Size - Specify the default font size for emails by selecting an option from the list.

- Search Language Indexer - The language that the Lucene indexer will index against. In most cases, Generic Indexer is the best selection as it incorporates English and common umlauts. However, if the user views the interface in certain languages, such as Chinese, Japanese, or Korean, this setting should specify the language for better indexing results.

- Use To: address for replies - When enabled, replying to a message via webmail will use that email's To: field as the Send From address of a reply, regardless of whether the message was sent to a specific SmarterMail email address or a domain alias, email alias, SMTP account, disposable address or plus address. For example, if an email is sent an alias, replies to that email via webmail will automatically use the email alias address of the Alias member as the Send From address. (This setting does not prevent a user from manually changing the Send From address when composing a message.)

- Request read receipts by default - Select this option to automatically request read receipts for all outgoing messages sent via webmail. When this setting is enabled, all outgoing messages

that are sent via webmail will request that the recipient(s) send a read receipt when the message has been read. If the read receipt is sent by the recipient(s), the user will receive a message from the System Administrator confirming that the message has been read. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.

- Request delivery receipts by default - Select this option to automatically receive delivery receipts for all outgoing messages sent via webmail and email clients. When this setting is enabled, the user will receive a message from the System Administrator stating the status of their outgoing message. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.
- Mark messages downloaded by POP as read - Select this option to mark all messages that are downloaded via a POP3 connection as read.
- Show images from external websites - Enable this option to automatically display all in-line remote content when an email is viewed. (Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in the message.) When this is enabled, the user will not have to manually display the remote content on emails they receive; it will be visible automatically. Note: Emails from trusted domains and senders will always display remote content automatically.

## Forwarding

If this card is not displayed, your domain has not been permitted to utilize automated forwarding. To display these options, a System Administrator must enable the Automated Forwarding feature for your domain.

- Forward all email to another address - Select this option to allow the user to utilize the automated forwarding feature and to display the forwarding settings. If this setting is disabled, the Forwarding card will not be displayed in the user's Account settings.
- Forwarding Address - The email address to which messages sent to the mailbox will be automatically forwarded. Note: Messages routed to other email folders via content filters or plus addressing will also be forwarded to this address.
- Forward Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
  - Normal - Includes original content, including font styles from original message, as part of the new message.
  - Text - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links, fonts or other formatting.
  - Embed as Attachment - Attaches the original message to the new message as an attachment.

The message will not appear in the body of your message.

- Delete messages when forwarded - Select this option to delete messages from the SmarterMail mailbox after they are forwarded.

## User Groups

User Groups are used to give a specific subset of users on the domain permission to access shared resources. For example, if a business wanted to make it easy for members of its sales department to share their calendars with other team members, the domain administrator would create a user group for all the sales department employees.

If any User Groups have been created, they'll be listed here and can be set to On or Off for specific users.

## Throttling

Throttling limits the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. Domain administrators can use this feature on a per user basis to either delay or reject messages that exceed their desired limits, thereby ensuring users don't send out massive amounts of email throughout the day that can possibly get the domain blacklisted.

Note: For each threshold and action, you'll see "(Default = X)" which indicates the throttling policy that's put in place by the System Administrator for the ENTIRE domain. It's important to consider the domain's throttling limits when modifying a specific user's limits. For example, if you set the user's throttling limit to the domain max, and that user sends that many messages in an hour, the WHOLE domain would be throttled. This means that outgoing messages from all users on the domain would either be delayed or rejected, depending on the domain's throttling action.

- Outbound Messages per Hour (0 = Unlimited) (Default = 5000) - The number of messages sent by the user per hour.
- Message Throttling Action (Default = None) - Select an action for SmarterMail to take once the particular thorttling level is reached. Of course, administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of mail being sent falls beneath the throttling limit that is set.
- Outbound Bandwidth per Hour (0 = Unlimited) (Default = 100) - The total number of MBs sent by the user per hour.
- Bandwidth Throttling Action (Default = None) - Select an action for SmarterMail to take once the particular thorttling level is reached. Of course, administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of bandwidth being used falls beneath the throttling limit that is set.

## Aliases

This settings page is only available to Domain Administrators.

An email alias is essentially a forwarding email address that can be used to forward messages to a single address or multiple email addresses. Aliases are most commonly used for departments or groups of individuals, like a small team of people working on a project or task. For example, in a working environment with multiple email addresses, the office may want to make a central email address that distributes messages to all personnel. The alias, `workplace@example.com`, can be made for messages to be sent and then distributed to all of the employees.

Note: Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address; there is not a mailbox associated with the alias and no email is ever actually stored for the alias itself. Instead, emails are simply sent to the list of addresses provided for the alias and are stored in the mailboxes of the individual users.

To access the email aliases for the domain, log in as a Domain Administrator and click on the Domain Settings icon. Click on Accounts in the navigation pane, then Aliases tab.

To create a new email alias, click New . Whether creating a new alias or editing an existing one, the following options will be available:

- Name - The name of the alias. This name will be used to create the email alias address. For example, if you want to use the email alias address "`info@example.com`", you'd simply use "info" for the Name. (You do NOT need to add the domain to the end of the name -- that's supplied automatically.)
- Display Name -- This is the friendly name used for the Alias. When used in conjunction with "Allow alias users to send from this alias", this is the display name that appears as the sender in the recipient's inbox.
- Email Addresses (one per line) - Type the full email address(es) of the user(s) who should receive emails sent to this alias.
- Internal use only - Enable this option to only allow emails to be delivered to accounts that are hosted within the same SmarterMail server.
- Include all domain users - Enable this option to include all domain users automatically in the alias. Note: This option does not override the email addresses listed in the Email Address box. If selected, all domain users will be included in addition to the users entered in the Email Addresses text box.
- Alias can be used as from address in webmail - Enable this option to allow alias users (those users/accounts that are part of the alias) to manually change their From address to the alias email address on new emails and replies. When a user sends mail as an alias, the recipient will

see the alias's Display Name as the email friendly from address. If the Display Name for the alias is blank, the user's Display Name shows.

- Show in Global Address List - Enable this option to display the alias in the Global Address List. Note: This feature is only available when using SmarterMail Enterprise.
- Show as a room in chat (Enterprise Only) - Enable this option to allow the alias to appear as a room in Group Chat. Enabling aliases for chat means that instant messages can be sent to the alias, and everyone in that alias, from within webmail as well as when using third-party chat clients.
- Use as domain catch-all - Enable this option to use the alias address as a catch-all account for the domain. A catch-all alias is an email address that will catch any incoming email sent to an invalid address on a domain. Instead of bouncing the message back to the sender, the message will be stored in the mailbox that is assigned as the catch-all account. Note: This option will only be visible if the System Administrator has enabled catch-all as a feature for the domain. In addition, only one email alias can be assigned as the domain catch-all at a time. Enabling a different alias as the catch-all will override any assignment already in place.

### A Note About Catch-All Aliases

A catch-all alias is simply that: an alias that catches all email sent to a domain that doesn't correspond to an actual account. Catch-all aliases can be useful as long as they are monitored and kept clear of unwanted email. However, due to the nature of email and the amount of spam that is sent every day, a catch-all can become a burden to email systems and to domain administrators. Therefore, it is suggested that they be used sparingly, or not at all if it can be avoided. Furthermore, it is important to never set an autoresponder on an email account that the catch-all forwards to, as it may result in backscatter, causing additional bandwidth usage and potentially causing your domain to be blacklisted.

## General Domain Settings

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.

Below are the options available for managing and configuring a domain. To access the domain settings, log into SmarterMail as a Domain Administrator and click the Domain Settings icon. Then click on General in the navigation pane. The following options will be available:

Jump To:

- Domain Aliases - Add an alternate domain name for users on the domain
- User Options - Adjust settings that apply to users on the domain
- Folder Auto-Clean - Add settings that affect the auto-clean rules set for the domain on default folders.



- Team Workspace Video / WebRTC - Set up alternate STUN/TURN server(s) for Team Workspaces
- Custom Help - Add a custom Help link to the Logout menu
- Webmail Login - Customize the login page for your domain
- Logout URL - Set a special page to load on logout
- Footer - Add a message footer that appends all outgoing messages
- Email Signing - Protect users from phishing schemes and spam attacks
- Mailing Lists - Set the Bounces Before Removal threshold for mailing lists

## Domain Aliases

A domain alias is basically an alternate domain name for one that already exists in SmarterMail. Domain aliases are useful, as they allow companies with multiple domain name extensions to receive any email sent to one of their domains directly within SmarterMail. For example, imagine you have a domain, 'example.com' with a user configured under 'user@example.com'. By adding a domain alias for 'example.net', any email sent to 'user@example.net' will be delivered to 'user@example.com'.

Note: You must own the domain name in order to create a domain alias. In addition, messages cannot be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.

### Creating a Domain Alias

To create a new domain alias, click New Domain Alias . Then enter the name of the alternate domain. The name will be used to create the domain alias email address. For example, if the name of the alias is "example2.com", the domain alias email address will be user@example2.com.

Note: By default, before a Domain Administrator can save a domain alias, SmarterMail will check that the mail exchange record for the domain is pointing to the server. This prevents Domain Admins from "hijacking" mail from valid domains. For example, if this check were not in place, a Domain Admin could add a domain alias of example.com. Then, any mail sent from the server to "anything@example.com" would go to the domain with the example.com domain alias, rather than to the actual domain. Alternatively, System Administrators who impersonate a domain will see an option when adding a domain alias on whether to verify the MX record before saving.

## User Options

This feature is only available when using SmarterMail Enterprise.

- Two-Step Authentication - Two-Step Authentication is a method of providing a second way to verify account ownership before a user can log into their account or connect to third-party clients and/or devices. For example, when a user has set up Two-Step Authentication for their

account, the SmarterMail login page will require their primary account password and a secondary verification of account ownership before the user can log into webmail. The second method of verification will be provided to the user through popular authentication apps, like Google or Microsoft Authenticator, or through a recovery email address. When this feature is enabled for a domain, the Domain Administrator can choose whether to Enable or Force Two-Step Authentication for their users - With Enable, users can choose whether to implement Two-Step for their accounts whereas with Force, users MUST use Two-Step for their accounts.

- Show calendar availability for all users in domain - This setting is enabled by default and allows SmarterMail to alert users of any scheduling conflicts when adding a member of the Global Address List as an attendee on a calendar appointment. In addition, this allows users to view an Availability window to review the times that their attendee is free/busy. When disabled, domain users' scheduling information will not be displayed in the appointment window.
- Allow users to opt out of Global Address List - The Global Address List (GAL) is basically a listing of all users who have accounts for your particular email domain. However, not all accounts would necessarily need to be listed in the GAL. For example, generic addresses like info@ or support@ may not need to be listed as they're used for specific purposes (e.g., support@ being imported into a ticketing system.)

## Folder Auto-Clean

Setting up auto-clean rules for email folders is a simple, yet effective, way to limit how much of the domain's disk space is taken up by users' Junk Email, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, or by automatically deleting mail older than X number of days, you can help ensure that your domain disk space does not fill up unnecessarily. In addition, if you want to set a size limit on a folder for users, their messages are deleted in the order that they were received so that older messages get deleted first.

- Allow users to override auto-clean settings - Enable this setting to allow users to override the domain policy and create their own auto-clean rules.
- Override auto-clean settings - Enable this setting to override the settings established by the System Administrator, allowing you to create your own rules. Any changes you make will not be affected if the System Administrator changes their policy, unless they disable domain overrides.

If "Override auto-clean settings" is off, the auto-clean rules created by the System Administrator will be displayed at the bottom of this card. (If no rules were created by the System Administrator, a note saying such will be displayed.

However, if "Override auto-clean settings is turned on, you're presented with a New rule button that

will allow you to create your own rule(s) for domain users. Auto-clean rules can be created for any default mail folder, and can be created based on a message's age or the folder's size.

## Team Workspace Video / WebRTC

This feature is only available when using SmarterMail Enterprise.

SmarterMail's Team Workspaces uses Web RealTime Communication (WebRTC) for peer-to-peer audio and video chat. WebRTC is an open standard that uses plugin-free APIs to connect web browsers (WebRTC compatible web browsers, that is) for the transfer of voice, video and general data.

For most people, using Team Workspaces as it's implemented in SmarterMail is perfectly fine. It uses a default STUN service to assist with the transfer of the data from user-to-user. However, larger or more complex networks may have restrictions that limit, if not fully deny, a Workspace's WebRTC requests. For example, the use of firewalls or the use of Network Address Translation (NAT) on their routers. In these cases, using a standalone STUN or TURN server may be necessary.

To add a separate STUN/TURN server for a domain, simply click the New STUN/TURN Server button. Once you do so, you'll be presented with the following:

- Type - Whether you're adding a STUN or TURN server.
- URI Paths - These are the paths to the STUN or TURN server you're setting up.
- Username - When setting up a TURN server, this is the username used to connect to that server.
- CREDENTIAL - When setting up a TURN server, this is the "password" for connecting to that server.

While STUN servers are very inexpensive for a company to operate (they're basically a glorified "What's My IP" service), TURN servers can consume a significant amount of bandwidth. Therefore, a TURN server may require you to use a paid service to host it for you. Companies like Twilio or Xirsys offer such services. If you want to host your own TURN server, one of the most popular options is Coturn, a Linux-based TURN server. Note: These are simply examples, and are NOT endorsements of any product or service mentioned.

## Custom Help

Note: This section will only be visible if the System Administrator has enabled Login Display Customization for the domain.

- Custom Help URL - Entering a full URL in this field will add a custom button to the Help menu that users can access in the SmarterMail interface. Administrators can link to a variety of things, including server-specific instructions for syncing, help resources, contact information, etc.

- Custom Help Text - The hyperlink text for the custom URL in the Help menu. Note: If no text is entered in this field, the hyperlink text in the Help menu will default to "External Help".

## Webmail Login

Domain Administrators can customize the SmarterMail login page for their domain to add a company logo, provide additional branding text, or simply adjust the default "Login to SmarterMail" text to be more in line with an overall brand message.

Note: This section will only be visible if the System Administrator has enabled Login Display Customization for the domain. Furthermore, if the System Administrator allows a domain to override the custom login display and the Domain Administrator does not enable customization for their domain, users will see the default SmarterMail login screen, regardless of whether the System Administrator has enabled a custom login display for the server.

- Logo Image - Upload an image, like a company logo, by dragging and dropping a file in the highlighted area or clicking to browse for a file (max file size of 3mb). Uploading an image using this upload control will host the image publicly on the server and enter the `` tag in the HTML section. Note: Uploading an image here alone will NOT display the image on the login screen. The HTML must remain in the Login Page HTML section. This upload control can be used by those who don't have their logo publicly hosted or who wish the image source to point back to their mail server. Furthermore, regardless of the image uploaded, the image's source URL will remain the same; only one image may be hosted at a time.
- Custom Login Text - Use this setting to customize the login page header to something more in line with an overall brand message. If Custom Login Text is left blank, SmarterMail's login page will show the default text "Welcome to SmarterMail".
- Custom Title Text - Use this setting to customize the title of the login page to something more in line with an overall brand message. If Custom Title Text is left blank, SmarterMail's login page will show the default text of "SmarterMail" in the browser tab title. Note: Users will see this text on the login page only, with their email address displayed as the browser title for all other pages.
- Login Page Language - Use this setting to set the default language of login page as well as the default language if "Login Display Customization" is enabled for a domain. NOTE: This setting will only go into effect for a new user who is visiting the SmarterMail login page for the first time, or if a user's local storage is cleared. This will NOT change the default language for users who return to the login page after already visiting it under a different language.
- Enable custom login page HTML - Enable this setting to use HTML to further modify the login screen to add additional text or adjust the layout.
- Login Page HTML - Enter the custom HTML that will be used to further modify the login

screen (in-line custom CSS can be used as well). Note: To include white space around the Image for Login Screen, the div id "companyinfo" must be included. In addition, Domain Administrators cannot enter scripts as this is considered to be unsafe code; however, System Administrators do not have this limitation.

- Preview Login - This button will open a small preview in a pop-up window of the login customizations you've made without you having to save your changes and test it yourself.

## Logout URL

In most cases, when a user logs out of SmarterMail, they are taken back to the standard login screen. However, Administrators can enforce a logout redirect for all users on the system (like to an Intranet page or company site) or allow Domain Administrators to enforce their own policies. In this section, the system policy will be displayed.

If the Administrator has allowed it, you can enable the ability to Override System Settings , then enter a unique logout URL for the domain in the Logout URL text box.

## Footer

If the System Administrator has enabled footer customization for the domain, Domain Administrators can configure server-wide message footers that SmarterMail will append on all outgoing messages, forwards that do not already have a footer, replies to messages and emails sent to a mailing list from SmarterMail, if enabled. Although similar to signatures, message footers are typically used to convey disclaimers or provide additional information. For example, a domain administrator may want every message to include a notice that the message was scanned for viruses or the text "Sent by SmarterMail." NOTE: If the system administrator has a footer configured and enabled for all messages, incoming messages will use that footer. If the domain footer is the only one being used, it is only appended to outgoing messages.

The following options will be available:

- Override footer settings for this domain - Enable this setting to customize the footer for your domain.
- Enable footer for all messages - When enabled, only outgoing messages will have the footer appended. When toggled to the right, new messages as well as replies and forwards will have the footer appended.
- Apply to mailing lists - By default, footers are not applied to emails posted to mailing lists. To add the footer to mailing list emails, enable the setting. Note: Mailing lists have their own configurable footers. If a custom mailing list footer is already configured, enabling this option will append a second footer at the end of each message posted to the mailing list subscribers. Because this may be confusing for mailing list moderators and recipients, most administrators

will choose to keep this option disabled.

- Footer - Use this section to create the message footer text. Clicking the edit icon will open a modal that includes an HTML-based editor, allowing admins to create footers that seamlessly fit into any email message. Note: The message footer does not support the use of variables.

## Email Signing

Email signing protocols can be used to protect users from phishing schemes or spam attacks. For example, DKIM signing uses cryptography to verify the authenticity of a message, ensuring the message came from your server and was not changed in transit. To enable DKIM Signing, click the Enable button. SmarterMail will display a unique Text Record Name and Text Record Value. You will need to contact your DNS provider and add the TXT record to your DNS server. After the TXT record has been added to DNS, click on the Enable button once again. SmarterMail will attempt to verify the DNS settings and DKIM Signing will be enabled.

To view the Text Record Name and Value, click on View Record . To adjust the mail signing settings, click the Settings button. Note: In most cases, these settings do not need to be altered. However, in the event that you would like to specify how closely you want the system to monitor messages in transit, please refer to the DKIM documentation linked below.

- Key Size - The length of encryption key to use. 2048 is recommended.
- Max message size to sign (MB) - This is the largest message size you want to sign using DKIM. DKIM generates a "hash" on the email up to the size limit. Generating the "hash" could be an expensive operation, especially if the domain sends large messages all the time. Limiting it means not having to process the whole message -- It would only grab the bytes up to the size limit and sign that.
- Body Canonicalization - The method used to monitor in-transit changes to the body of a message. Two canonicalization algorithms are defined for the body: a "simple" algorithm that tolerates almost no modification and a "relaxed" algorithm that tolerates common modifications such as whitespace replacement and header field line rewrapping. For more information, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .
- Header Canonicalization - The method used to monitor in-transit changes to the header of a message. Two canonicalization algorithms are defined for the header: a "simple" algorithm that tolerates almost no modification and a "relaxed" algorithm that tolerates common modifications such as whitespace replacement and header field line rewrapping. For more information, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .
- Header Field to Use - The header fields included in the hash algorithm. This is further defined by header fields. For assistance in determining the header fields to sign, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .

- Header Fields - The header fields included in the hash algorithm. Note: List only one header field per line break.

### **Setting Up Email Signing**

Setting up email signing and creating the fields necessary to add DKIM to a domain's DNS record is simple within SmarterMail.

- Log in as a Domain Administrator
- Click on the Domain Settings icon
- Navigate to the domain's General settings
- Find the Email Signing card
- Click on the Settings button
- A modal window opens, like the one below. Here, all of the DKIM settings are displayed. SmarterMail defaults all of these to a set of general recommendations, but they can be adjusted as needed.
- Make any changes you want and save them. If no changes are made, simply click the Cancel button.
- Next, click the Enable button on the Email Signing card. A modal window will open, and it will contain the text necessary for adding the DNS record. This window contains two important pieces of information: the "Text Record Name" and the "Text Record Value". The Text Record Name contains the "DKIM selector", which is the value that precedes ".\_domainkey". For example, "2B8U4DAB93D58YR". The selector can be used to verify that your DKIM record is set up correctly. (When the Text Record Name is added to DNS, the ".domain" should automatically be appended by DNS.) The Text Record Value is also the public key that's created by the SmarterMail server. Therefore, it's the encrypted key that pairs to the private key that's stored on the mail server. This is why it looks like a random series of characters.
- Now that you have the Name and Value for the TXT record, you will want to log in to your DNS provider and create the actual DNS record. How you do this depends on who your provider is. In general, the DNS TXT record format will be as follows:

## Email Signing ?

Changing these settings will disable DKIM signing until new DNS records are established.

Key Size  
2048 (Recommended) ▼

Max message size to sign (MB) \*  
100

Body Canonicalization  
Relaxed ▼

Header Canonicalization  
Relaxed ▼

Header Fields to Use  
All non-repeatable fields ▼

Header Fields

- from
- to
- subject
- date
- message-id

Cancel Save



**Email Signing** ?

Before enabling DKIM Email Signing, the following TXT record must be added to your DNS server.

Text Record Name  
8D6C83AB9877A17.\_domainKey

Text Record Value  
p=MIIBljANBgqhkG9w0BAQEFAAOCAQ8AMIIBCgKCAQEAnytzOV/MFYaFHF9xeZf5ik97KZnQmUREu9+7xkRP+pasr8YX2TUhn5dIY+7IVhRXXj/htBmEzCwfsHKx4qBZUBA7d2jEcv7ZXIWOQcf6BpVtlizne/SpuZSeKs+LkkEOGagR7yqKLLbZZut9VBNrkkfcdiZ50pxVkiFr9joM4Ox7PpTxvf4UfjUmvNCgAMzNnUDCOOHL/tKnTV8o2rAv1c/wUxDyJiOL33SJve/fbqjV0SUR5qayacfbg3xh0uvkMxH

Close

- NAME = Text Record Name, which will be something like 2B8U4DAB93D58YR.\_DomainKey
- TYPE = TXT
- VALUE = Text Record Value, which contains the public key created by SmarterMail

NOTE: As this is a change to DNS, it may take a few hours for the record to propagate for the domain. Generally that propagation is pretty fast, but it could take 24 hours or more.

### **Validating Your DKIM Record**

Once you've made the changes to your domain's DNS, it can take a few hours for those changes to take effect. To test whether you're set it up properly, you can do a search for "DKIM record validation" or use a site such as MXToolbox . MXToolbox makes DKIM validation simple; you just need your domain name and the selector. (The "selector" is what comes before the "." in your Text Record Name. So if your Text Record Name was 2B8U4DAB93D58YR.\_domainKey, the selector is 2B8U4DAB93D58YR). Enter those into their form, and they'll let you know a) if the record can be found, and b) if it's valid.

## Attachments

- **Inbound Extension Blacklist** - This list allows you to limit the file types that can be attached to emails sent to users on your domain. For example, many email administrators won't allow executable files (EXE) as they can cause issues on the mail server, and possibly across an entire network. To add a blacklisted file type, simply type in the file extension, one per line. (E.g., .exe or EXE)
- **Outbound Extension Blacklist** - This list allows you to limit the file types that are users on your domain are allowed to send out of the mail server. For example, many email administrators won't allow batch files (BAT) as they can cause issues on the recipients' mail server, and possibly across their entire network. To add a blacklisted file type, simply type in the file extension, one per line. (E.g., .bat or BAT)

## Mailing Lists

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. Unlike an Alias, a mailing list allows people to subscribe to, or unsubscribe from, email communications. In addition, mailing lists can be public or private, be replied to by all users or managed by a single list administrator and more. Use this card to specify the following mailing list setting:

- **Mailing List Command Address** - This is, essentially, the "To" address for your listserv. If someone wants to subscribe to a list, for example, they'd email `listserv@your-domain.com` with the listname and the word "subscribe" in the body of their message. They'd then be subscribed to that mailing list.
- **Bounces Before Removal** - The number of times a message to a specific subscriber may bounce before the subscriber is automatically removed from the mailing list. By default, this number is 2.

## Chat Search

This settings page is only available to domain administrators.

A major advantage of SmarterMail is that it stores all chats, regardless of whether the chats occur within the webmail interface, using a third-party client or a combination of both. Domain administrators have the ability to perform custom searches by date range, by the users involved in the chat conversations, by specific keywords or phrases used during a chat or a combination of all of these variables. The results can then be downloaded to a desktop or laptop (search results cannot be downloaded to a mobile device due to storage limitations) and reviewed as needed. Note: Chat history

search is configured by the System Administrator. For more information, see the Features area of the All Domains page of SmarterMail Help.

The options available when performing a chat history search are as follows:

- Date Range - The date range you want to use for your search. You can either type in the date or click on the calendar icon and use SmarterMail's calendar control to select your start and end date.
- User - The username or email address of the person who participated in a chat.
- Name - The Display Name of the person who participated in a chat.
- Text - Any word or phrase that was used during a chat. For example, "2012 sales numbers" or "product ID 33489".

## Chat Clients and Encryption

Many XMPP chat clients out these days encrypt the chats that happen between 2 or more users. Unfortunately, this encrypted chat traffic occurs between the client and SmarterMail itself. (Or fortunately, depending on where you fall on the topic of personal encryption.) Therefore, while SmarterMail will see chats occur, it doesn't have the ability to capture and archive the unencrypted text. Therefore, some results returned when you do a Chat History search will appear garbled or show generic text, like this from the XMPP client Gajim:

[This is part of an encrypted session. If you see this message, something went wrong.] ([This is part of an encrypted session. If you see this message, something went wrong.])

## Domain Content Filtering

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.

Content Filtering at the domain level is a great way to perform actions that meet specific criteria for all users on the domain . For example, you can use content filters to delete messages with certain attachments (e.g., attachments with a .exe extension), forward messages from a specific email address to another account, or even alter the subject of specific types of email. Content filters are most commonly used to organize email by moving messages to specific folders. However, content filtering is extremely flexible and allows you to filter messages for users the way you want to.

Note: The evaluation of domain content filters happens before the evaluation of account-specific content filters.

To access the content filtering settings for the domain, log into SmarterMail as a Domain

Administrator and click on the Domain Settings icon. Then click on Content Filtering in the navigation pane.

To add a new content filter, click New . The following options will be available:

## General

- Name - The friendly name chosen to describe the rule.
- Match Type - Because multiple conditions can be configured per content filter, SmarterMail provides the option to require ALL conditions to be met or only ONE of the conditions to be met in order for the rule's action to be triggered. Select the appropriate option from this list.
- Enable wildcards in search strings (\* and ?) - Enable this setting to allow wildcard functionality. Wildcards can be used to replace a specific word, phrase or character, where a question mark (?) represents a single character and an asterisk (\*) represents any text. For example, if you wanted to block sales01@domain.com, sales02@domain.com and sales03@domain.com, you could enter sales??@domain.com . If you wanted to block all sales addresses, you could enter sales\* instead.

## Conditions

Click on New Condition to specify the criteria that triggers the rule's action(s). For each condition selected, you will be able to add specifications and enter any necessary details, as required. For example, if you choose to filter on 'From Address', you can enter one or multiple email addresses. If you choose to filter on 'Contains specific words or phrases', you can enter the specific text and choose to look for that text in an email's subject, message body, header, etc.

On many conditions, you also have the ability to reverse the logic of the criteria item by changing the Comparison selection. For example, imagine you only want to accept email from specific domains. You would choose the 'From specific domains' condition and set the Comparison field to 'Does Not Match'. Any messages sent from domains that do not match what you've entered in the text box can be deleted.

Note: If you select a condition that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following conditions are available, separated by Condition Type:

### From Address

- From specific addresses
- From specific domains
- From trusted senders

### Contains Specific Words or Phrases

- Subject
- Body
- Subject or Body
- From Address
- To Address
- Email header
- Anywhere in message

### To Address

- To specific addresses
- To specific domains
- Only to me
- My address in to field
- My address not in to field
- My address in to or cc field

### Attachments

- Has any attachment
- Specific filenames
- Specific extensions
- Over specific size

### Other

- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated
- Message over size
- Message under size
- Received in date range
- Sent through a specific server (by IP address)
- Spam probability

## Actions

Click on New Action to specify what should occur when an email triggers the content filter condition(s). Note: If you select an action that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following actions are available:

- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: Messages deleted through content filtering cannot be recovered.
- Reroute message - Forwards the message to another email address. Unlike 'Forward message', this option will not store a copy of the email in your own account.
- Bounce message - Sends a message back to the sender of the email saying that the message was bounced. Note that the message is still delivered to you unless you choose to delete it as well. Note: If the System Administrator has disabled bouncing, this option will function the same as the delete action.
- Move message - Delivers the incoming message to the folder you choose from the dropdown list. Note: If you later delete that folder and leave the content filter active, the filter will automatically create the folder when the action is triggered.
- Add Header - Adds an email header within the incoming message, which can be useful when performing additional filtering through Outlook or another email clients. Headers should be formatted like "X-someheadername: value"
- Add text to subject - Appends a prefix to the subject line of the email. This is useful for categorizing emails as the subject line will be altered to include the text you specify in the text box.
- Forward message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- Mark as read - Automatically marks the messages a read, which means it will not show up in your inbox, or any other folder, as unread.
- Set Priority - Automatically elevates the priority of a message. For example, if you create a content filter that flags a message from a VIP, you may want to set the priority of the message to High as well to denote its importance.
- Flag message - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.

## Domain Events

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.
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The Event system in SmarterMail is an incredibly powerful and flexible tool that allows Domain Administrators to automatically perform actions based on specific criteria and remain up-to-date with what is going on with the SmarterMail server and user accounts. SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to users that need the information. For example, Domain Administrators can automatically add an additional recipient on messages sent or received by users or receive notifications when a task is due or their domain disk space has met a certain threshold.

To create or view events for the domain, log into SmarterMail as a Domain Administrator and click on the Domain Settings icon. Then click on Events in the navigation pane. To create a new event, click New . The following options will be available:

## General

- Event Name - The friendly name of the event.
- Event Status - New events default to a status of Enabled. However, to temporarily stop an event from triggering, you can change the status to Disabled.
- Event Category - The feature to which the event pertains: User, Mailing List, Alias, Throttling, Email or Collaboration.
- Event Type - The occurrence that triggers the event. Each category has several specific event types that can trigger the action.

## Conditions

Each event type has its own corresponding conditions. The global conditions that are seen across all event types are listed below.

- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.

## Actions

Each event type has its own corresponding actions. The global actions that are seen across all event types are listed below.

- Send a notification - This option will send a notification to the Notifications window. It can also send a popup browser notification and an email.
- Send an email - This option will send an email to the specified address.

## A Practical Example: Receive an Email When a New There's a New Subscriber to a Mailing List

This practical example of setting up an Event is the result of an old knowledge base article we had. It details how to set up an event that sends an email to the List Administrator when a new persons subscribes to that List Administrator's mailing list. As an aside, while this is an exmaple of setting the Event up as a Domain Administrator, the process for setting it up as the List Administrator is very similar.

- Log into SmarterMail as the Domain Administrator.
- Click the Domain Settings icon.
- Click Events in the navigation pane. A list of existing events will load.
- Click the New button.
- On the General card, do the following:
  - In the Event Name field, type a descriptive friendly name for the event.
  - In the Event Status drop down, select Enabled.
  - In the Event Category field, select Mailing.
  - In the Event Type field, select Mailing List Subscribe.
- On the Conditions card, a new Condition is possibly already there. This is perfectly fine. However, since we want to be notified when a new person subscribes to a specific mailing list, you'll want to click the New Condition button. Then do the following
  - On the Condition modal, select Mailing List Address from the dropdown, then enter the full address for the list. (E.g., testlist@example.com)
  - Click the Save button to add the new Condition.
- On the Actions card, click the New Action button. Then do the following:
  - On the Actions modal, select Send and email from the dropdown.
  - The modal will change, allowing you to select your Frequency, From Address, To Address, Subject, etc. then add the email contents that will be sent. Your To Address should be the List Administrator. You can leave the email's content the default that's filled out or edit it how you see fit.
  - Click the Save button.
- Your new Event is pretty much finished. Just click the Save button to actually save the Event so that it can run.



## Message Archive Search

Message archiving is a method of storing all email and live chat traffic for a domain -- either inbound messages, outbound messages or both -- in a separate location on the mail server. Typically, this feature is used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002 or other regulatory compliance.

It is important to note that message archive search is available to Domain Administrators only when rules are set up individually for their specific domains. If archiving is set up for "all domains" on a server, then only the System Administrators will be able to search the message archive. Therefore, if a Domain Administrator needs access to the email archive for the domain "example.com", then a Message Archiving rule specifically for example.com needs to be set by the system admin.

System Administrators can perform a message archive search by clicking on the Settings icon, selecting Message Archive in the navigation pane, and clicking the Archive Search tab. System Administrators can search for a message by domain, date range, the sender's address, the recipient's address, or the subject.

When message archiving is set up for a specific domain, that domain's Administrator(s) can find a Message Archive Search option by clicking on the Domain Settings icon then clicking on Message Archive Search in the navigation pane. Domain administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

For more information on archiving, see [Message Archiving](#).

## Sharing

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.

In the Sharing section, Domain Administrators have the ability to create a few resources for all users of the domain:

- **Domain Calendars** - Domain Calendars can be used for company-wide events such as company holidays, payroll or PTO schedules. Domain calendars show up as "subscribed" calendars for users and can be displayed/hidden in a user's Calendars area just like other calendars.
- **Conference Rooms** - Conference Rooms are used in conjunction with meetings/events that are created. When creating a new event in a calendar, a shared conference room can be selected for the location of that meeting/discussion/event.
- **User Groups** - User Groups are used to give permissions to specific subsets of users on the

domain to access shared resources. For example, if a business wanted to make it easy for members of its Sales Department to share their calendars with other team members, the Domain Administrator would create a User Group for all the Sales Department employees.

The Sharing page is separated into 2 different cards:

## Sharing

The Sharing card is where Domain Administrators create shared calendars and/or conference rooms. When clicking the New Shared Resource button on the Sharing card, the Domain Administrator is presented with a modal window that contains the following information to be filled out:

- Name - The name of the resource. It's always a best practice to name the shared resource something that will be easily identified by users. For example, if the resource will be a conference room name the resource the same as the room designation. For example, South Conference Room or Main Hall. For calendars, something like "PTO Calender" or similar.
- Type - The type of resource being added: Calendar or Conference Room.
- Users - Here, you'll enter individual users that will receive the share. Enter only the username of the account. (For example, for user account, "jdoe@example.com", you would enter "jdoe".) Once you begin typing the username, you'll notice a second line appears below where you're typing. This allows you to share the resource with any number of individual users.
- User Groups - User Groups can be selected to give permissions to specific subsets of users on the domain. By default, two groups are always available: Everyone and Admins. If other User Groups have been created, they'll appear in this dropdown list.
- Access Permissions - Next to the usernames you've added, or the User Groups selected, you'll want to set the type of access for each:
  - None - This option can act as a negator for permission settings. For example, if you provide access to the Admin user group, you can omit one or multiple of those Admins by entering their name in the Users field and selecting None for their access.
  - Read-Only - This option allows Users or User Groups to see the shared data but they do not have the ability to edit the item.
  - Full Control - This option allows Users or User Groups to fully edit the shared data.

As an example, here are the steps to set up domain calendar:

- Login as the domain administrator
- Click on the Domain Settings icon.
- When the Domain Settings menu loads, click on Shared Resources.
- Click the New Shared Resources button.
- Enter name of the Calendar you're creating.

- For Type , select Calendar to create a domain shared calendar. Otherwise, select Conference Room to allow for conference room scheduling.
- Next, you'll want to set up the Permissions for sharing the calendar or conference room with Users or User Groups for the domain.
- Once all settings have been added, click Save.
- Once saved, the domain calendar will be automatically mapped to all users and available for them to start using on any new calendar items they create.

## User Groups

To create a User Group, click the New User Group button on the User Groups card. To edit an existing user group, simply click on the corresponding group name. A modal window will pop up with the following options:

- Name - The friendly name of the user group. For example, "Sales Team".
- User - The individual Users you want to add to the user group. Start typing the username and it will be displayed. Simply select it to add it to the User Group. Note: Alisases can not be added to a User Group.

Regardless of whether you're creating shared Calendars or Conference Rooms, or setting up User Groups, be sure to save your information after you've finished your edits.

## Signatures

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.

An email signature is a block of text automatically appended at the bottom of an email message. Signatures may contain the sender's name, address, phone number, disclaimer, or other contact information.

Businesses that want to ensure a consistent company appearance may require employees to follow a specific signature format. Instead of allowing the users to define their own signatures, the domain administrator can create a domain-wide signature that all employees must use. Depending on the signature configurations set up by the domain administrator, users may or may not be able to override the default signature.

To access the domain signature settings, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Signatures in the navigation pane.

## Signatures

To create a new signature, click on [New](#) . To edit an existing signature, click on its Signatures card.

Whether you add or edit a signature, the signature creation window appears. Here, you can create signatures using a full HTML editor that allows domain administrators to add in stylized text, links to websites, images and even icons linked to social media outlets. In addition, the signature can incorporate variables so that a generic template can be created for all users of the domain. The available variables are listed by clicking the Custom Variables dropdown in the text box's toolbar, which looks like a settings cog. (If the cog icon doesn't appear in the toolbar, you may need to click the + sign to "Show More" tools.)

## Default Signatures

Use this card to assign a domain-wide signature for all users on your domain and any email or domain aliases that have been configured. To allow users to create and use their own signatures, activate the setting [Enable users to override](#) . Note: If this setting is disabled, users must use the domain-wide signature. To assign a signature to your domain, select the signature from the dropdown menu and enable the mapping by moving the slider to the right.

## Domain Spam Filtering

This settings page is only available to Domain Administrators and System Administrators with the proper permissions.

SmarterMail includes a variety of antispam measures that will help keep a user's inbox free of unwanted mail. In the Spam Filtering section, Domain Administrators can review/configure the spam filtering options and trusted senders for users on their domain. To access the spam filtering configuration, log into SmarterMail as a Domain Administrator and use the [Menu](#) icon to navigate to the Domain Settings section. Then click on Spam Filtering in the navigation pane.

Jump To:

- [Options](#) - Configure the filtering Actions for spam messages on your domain
- [Trusted Senders](#) - Exempt specific email addresses and domains from spam filtering

## Options

In most cases, a System Administrator has already configured the filtering options -- spam weights and Actions -- for spam messages on your domain. However, if the System Administrator allows it, Domain Administrators can override those settings and change the Actions configured for spam messages of varying weights to help further remove potentially unwanted email.

## Options

- Override spam settings - Enable this setting to customize the spam filtering Actions for your domain. If this option is disabled, the systems's default spam filtering policy will be displayed.
- Allow users to override spam settings - Enable this setting if, as the Domain Administrator, you want to allow users to be able to further edit and manage the Actions taken on messages of varying weights.

## Editing Actions

Each type of spam check has an associated weight that factors into the spam probability of a message. In addition, a specific Action is set for messages that score the weight set by the System Administrator.

To edit the action, click on the card associated with the weight you want to edit. From there, click the dropdown on the Action to change it and click the OK button to save your change.

## Trusted Senders

Domain Administrators can add specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. This lets the system know that these messages come from a trusted source and can prevent mail from friends, business associates and mailing lists from being blocked or sent to the Junk Email folder. By default, every contact in a user's Contacts list is considered a trusted sender and bypasses spam filtering.

Note: If SPF and DKIM spam checks are enabled, SmarterMail will run those checks on ALL emails, including those from trusted senders. Because anyone can write any return path that they want when sending a message, this extra check helps prevent spammers from flooding users with hundreds of messages that aren't truly from a trusted sender. If the SPF and DKIM weights on a message from a trusted sender meet the Low, Medium or High spam filtering threshold, the corresponding spam filtering action (Move to Junk Email Folder, Delete Message, Add Text to Subject) will be performed on that email, despite the email coming from a trusted sender.

When entering trusted senders or domains, enter only one item per line break.

## User Defaults

For domains that have a large number of users, it can be time consuming to make a change to user settings -- increase the Mailbox Size Limit or disabling the ability to change passwords, for example -- and then ensure the changes are applied to all users. With User Defaults, however, Domain Administrators can create a template for the default user settings so that they only have to make the change in one location, and then propagate those settings to a select few users or each user on the

domain. This makes changing settings quick and easy and ensures each user has the exact same permissions and settings applied.

## User Defaults

To review the default configuration for new users, click on the User Defaults button. (The default user settings are identical to those found when adding or editing a user. For more information on these settings, refer to the Managing Users page.).

You can make whatever changes you want to these settings, and any NEW accounts that are added will use these defaults. However, it's also possible to change these settings, then push those settings to one or more users individually, or to all users. In the case of pushing changes to individual users, say you have a set Mailbox Size Limit set for all users of 2000MB (2GB). However, the C-Level execs need more. It's possible to change that limit to something higher -- 8000MB (8GB), for example -- and then push that change to all of the accounts set up for the C-Level executives.

## Propagation

To apply some or all of the default user settings to some or all of the existing users on the domain, do the following:

- First, make any changes you want on this page, then click the Save button.
- Next, click on the Propagate button. A modal window opens up.
- Scroll down the list of settings, placing a check mark next to the settings you want to push to your user(s).
- Once all items have been selected, you can pick who you want to propagate the changes to:
  - Specific Users - Selecting this allows you to start entering the users you want to propagate the changes to. These changes will only propagate to the users you enter.
  - All Users - This will propagate the changes to all users of the domain.
- Once you've selected your changes, and added the specific users you want to propagate the changes to, click the Propagate button.

NOTE: Simply making a change to the User Defaults doesn't automatically propagate, so a change to default settings does not change users that are already in place for the domain. They only affect any new users that are created. In order for changes to take effect, they must be propagated. In addition, if you're making changes to individual users, you may need to go back and change the propagated settings back to what they were originally. Otherwise, any new users created will use those new settings.

NOTE: If a System Administrator is impersonating a domain administrator and wants to propagate

settings changes -- and, specifically, Exchange Synchronization changes -- User Administration for those settings MUST be enabled for the domain. Otherwise, changes will not be saved for users.

## [Mailing Lists](#)

### Mailing Lists Overview

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For example, many companies use mailing lists to email newsletters, promotional offers, or information about product updates to subscribers. Unlike an Alias, a mailing list allows people to subscribe to, or unsubscribe from, email communications. In addition, mailing lists can be public or private, be replied to by all users or managed by a single list administrator and more. NOTE: SmarterMail can accommodate mailing lists of up to 75,000 subscribers. Anything greater than that should be managed by a third-party mailing list service provider such as Constant Contact or MailChimp.

Using a mailing list is as simple as sending a standard email: the allowed posters simply send an email to the list address, which takes the form of the list name appended to the domain name. For example, if you create a mailing list called "newsletter" you send a message to newsletter@example.com. If there are other requirements, such as a password, etc. those need to be taken into account as well.

By default, when a subscriber reads a mailing list message, the From field in the subscriber's inbox will display the email address of the individual that sent the mailing list message; the To field will display the list name or mailing list email address; and the Reply To field will display the mailing list email address or the email address of the individual that sent the message, depending on the list settings.

Mailing Lists can be managed by System Administrators with Manage Domains permissions, Domain Administrators and the List Administrators themselves. Accessing Mailing Lists is dependent on the role you possess:

#### **List Administrators**

To view your mailing lists, log in with your username and navigate to your Settings. Then click on Mailing Lists in the navigation pane. The Mailing Lists you administer will be listed here.

#### **Domain Administrators**

To view the mailing lists for a domain, log into SmarterMail as a Domain Administrator and navigate

to the Domain Settings . Then click on Accounts in the navigation pane. If mailing lists are enabled for the domain, they'll be listed here.

### **System Administrators**

To view the mailing lists for a domain, log in to SmarterMail as a System Administrator and click on the Manage icon, then click on Domains in the navigation pane. Select the domain from the list to edit it. If you have domain management permissions, you'll see a number of tabs displayed. Click on the Accounts tab, then the Mailing Lists sub-tab. The mailing lists for the domain will be listed here.

Regardless of your role, whether creating a new mailing list or modifying an existing one, the following options will be available:

- Options - Configure the mailing list options and permissions
- Subscribers and Digest Subscribers - Add subscribers who will receive the standard mailing list postings or digest emails.
- Posters - Whitelist email addresses or domains who can post to the mailing list
- Banned Users - Prevent specific email addresses or domains from posting to the mailing list
- Messages - Configure the header and footer for postings as well as the replies sent to listserv commands
- Custom Fields - Customize list postings with subscriber custom fields

### **Variables**

Emails that are posted to a mailing list support the use of the following variables. These variables can be used in the body or subject line of emails that are sent to the mailing list subscribers and also in the footer, header and subscriber Messages . Though similar to Custom Fields in format, these variables need no additional configuration. Simply enter the variable below to display its associated information. Variables will always follow this format: #Variable#

- Unsubscribe Link (#UnsubscribeLink#) - An unsubscribe variable is included to allow users to unsubscribe from the mailing list with a URL. Note: This URL can also be given friendly hyperlink text (rather than linking the URL) by modifying the Friendly Unsubscribe setting when configuring or modifying a mailing list. For more information, see Mailing List | Options .
- Recipient (#Recipient#) - The email address of the subscriber who was sent the message.
- Sender (#Sender#) - The email address of the user sending the message.
- Domain Date Now (#DomainDateNow#) - The current date (in shorthand) according to the domain's new user time zone defaults found in User Defaults. Ex: 07/13/2015.
- Domain Time Now (#DomainTimeNow#) - The current time according to the domain's new user time zone defaults found in User Defaults. Displayed in 24-hour format.



- Domain Date Time Now (#DomainDateTimeNow#) - The current date and time according to the domain's new user time zone defaults found in User Defaults. Displayed in shorthand and 24-hour format.
- Domain Day Now (#DomainDayNow#) - The current date (date alone, without month and year) according to the domain's new user time zone defaults found in User Defaults. Ex: 13.
- Domain Month Now (#DomainMonthNow#) - The current month (in numeric value) according to the domain's new user time zone defaults found in User Defaults. Ex: 07.
- Domain Year Now (#DomainYearNow#) - The current year according to the domain's new user time zone defaults found in User Defaults. Ex: 2015.
- Domain Day Name Now (#DomainDayNameNow#) - The current day of the week according to the domain's new user time zone defaults found in User Defaults. Ex: Monday.
- Domain Month Name Now (#DomainMonthNameNow#) - The current month (by its name) according to the domain's new user time zone defaults found in User Defaults. Ex: July.
- Moderator Date Now (#ModeratorDateNow#) - The current date (in shorthand) according to the Moderator's time zone. Ex: 07/13/2015.
- Moderator Time Now (#ModeratorTimeNow#) - The current time according to the Moderator's time zone. Displayed in 24-hour format.
- Moderator Date Time Now (#ModeratorDateTimeNow#) - The current date and time according to the Moderator's time zone. Displayed in shorthand and 24-hour format.
- Moderator Day Now (#ModeratorDayNow#) - The current date (date alone, without month and year) according to the Moderator's time zone. Ex: 13.
- Moderator Month Now (#ModeratorMonthNow#) - The current month (in numeric value) according to the Moderator's time zone. Ex: 07.
- Moderator Year Now (#ModeratorYearNow#) - The current year according to the Moderator's time zone. Ex: 2015.
- Moderator Day Name Now (#ModeratorDayNameNow#) - The current day of the week according to the Moderator's time zone. Ex: Monday.
- Moderator Month Name Now (#ModeratorMonthNameNow#) - The current month (by its name) according to the Moderator's time zone. Ex: July.
- Server Date Now (#ServerDateNow#) - The current date (in shorthand) according to the server's system time zone. Ex: 07/13/2015.
- Server Time Now (#ServerTimeNow#) - The current time according to the server's system time zone. Displayed in 24-hour format.
- Server Date Time Now (#ServerDateTimeNow#) - The current date and time according to the server's system time zone. Displayed in shorthand and 24-hour format.
- Server Day Now (#ServerDayNow#) - The current date (date alone, without month and year) according to the server's system time zone. Ex: 13.

- Server Month Now (#ServerMonthNow#) - The current month (in numeric value) according to the server's system time zone. Ex: 07.
- Server Year Now (#ServerYearNow#) - The current year according to the server's system time zone. Ex: 2015.
- Server Day Name Now (#ServerDayNameNow#) - The current day of the week according to the server's system time zone. Ex: Monday.
- Server Month Name Now (#ServerMonthNameNow#) - The current month (by its name) according to the server's system time zone. Ex: July.

## Options

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.

To view the mailing lists for a specific domain, click the Settings tab, then click Mailing Lists in the navigation pane.

This page consists of a number of tabs, and each tab has its own page:

- Options - The configuration options for an individual mailing list.
- Subscribers and Digest Subscribers - Add subscribers who will receive the standard mailing list postings or digest emails.
- Posters - Whitelist email addresses or domains who can post to the mailing list
- Banned Users - Prevent specific email addresses or domains from posting to the mailing list
- Messages - Configure the header and footer for postings as well as the replies sent to listserv commands
- Custom Fields - Customize list postings with subscriber custom fields

## Creating a New Mailing List

To create a new mailing list, click the New button in the content pane toolbar. You can also edit an existing mailing list by clicking on it. When you click the New button, a modal window opens with the following fields:

- List Address - This is the address that will be used for the address. A List Address is similar to a new Account address: it simply needs to be whatever will be appended to the left of the domain name. For example, "MarketingNewsletter".
- List Administrator - This is the existing Account that will act as the administrator of the list. Select a user from the drop down.

Once the new list is created, its options will open, where you can edit the list as needed. These cards and options are discussed below.

## Options Tab

### Options

- Name - Essentially, the "username" for the mailing list. SmarterMail will use the name to create the actual email address that will be associated with the mailing list.
- Status - New mailing lists default to a status of Enabled. To temporarily prevent postings to this list, change the status to Disabled.
- List Administrator - The "owner" of the mailing list. This person will actively manage the mailing list, posts to the list and any replies. The moderator must be an active email user for the domain.
- Show in Global Address List - There are times when you may want a mailing list to show up in the Global Address List so that all of your subscribers can send to it. If that's the case, enable this setting.
- Description - A brief summary of the mailing list.

### Message Options

- List To Address - The email address that will display in the To field when a subscriber receives a mailing list message. Setting this to List Address means that the email address associated with the list will display as the To: address when recipients receive the message.
- List From Address - The email address that will display in the From field when a subscriber receives a mailing list message. By default this is set to List Address.
- List Reply To Address - The email address that will display in the Reply To field when a subscriber receives a mailing list message. When a subscriber hits 'Reply' to the message, this address will receive the reply. If a subscriber hits 'Reply All' all list recipients will receive the reply. By default this is set to List Address
- Text to show in unsubscribe link - The text entered here will be hyperlinked when using the Unsubscribe variable . If this field is left blank, the unsubscribe link will hyperlink the full URL.
- Webmail URL - The URL for the SmarterMail login page. This setting can be used to override the server's configured hostname for mailing list communications. Note: URLs should include the https:// prefix. For example: https://mail.example.com/
- Send Subscribe Email - Select this option to automatically send an email to new subscribers confirming their subscription to the list. Note: This is not an opt-in message, only a confirmation email.
- Send Unsubscribe Email - Select this option to automatically send an email response to unsubscribe requests.
- Enable Double Opt-In - Select this option to automatically send an email to new subscribers

that requires them to confirm that they are subscribing to the list by clicking on an activation link. Using double opt-in is a good way to confirm subscriptions to the list and to help reduce abuse complaints.

- **Disable List Error Replies** - Select this option to prevent the system from automatically replying to incorrect listserv commands.

## **Posting**

- **Password** - To restrict people from sending emails to a mailing list, type a password in this field. Note: To send emails to a mailing list that is password protected, you must add the password to the beginning of the subject line of the email, enclosed by brackets and colons. For example, if "password" is entered into this field, the subject line of the email would need to begin with [:password:].
- **Allowed Posters** - An email that is sent to the mailing list (and therefore to its subscribers) is considered to be "posted." Use this field to specify who has access to post to the list. Note: Email addresses specified on the Posters tab will override this field.
- **Anyone** - Anyone can email the list, regardless of whether they are subscribed to the list or not. In turn, this sends an email to all members. Note: This setting can cause abuse if it is not closely monitored. Therefore, it is recommended to restrict the allowed posters to 'subscribers only', at the very least. For larger lists, allowing Moderator Only is a better idea and will cause less issues.
- **Subscribers Only** - Allows the list subscribers, and only the list subscribers, to send and receive posts. The moderator will still be permitted to post. This can cause abuse issues as well if you have an active list, so using Subscribers Only should only be used for smaller lists or for digest mode only.
- **List Administrators Only** - The List Administrator(s) is/are the only one(s) who can post to the list. This means that no one else, not even list subscribers, will be able to post.
- **Subject Prefix** - The optional text that will appear in the subject line. SmarterTools recommends using a subject prefix for discussion lists to help subscribers easily filter through posts. For example, add a "List- " or "Discussion -" prefix so that users know that the message is posted to an email list. Recipients can then create filters to move those messages to a specific folder or manage them in some other way.

## **Commands**

- **Enable SUBSCRIBE Command** - Select this option to allow people to subscribe to the mailing list by emailing a listserv command to the command address. For more information, refer to Listserv Commands . Note: If this option is disabled, only list administrators can add new subscribers to the mailing list.

- **Enable LIST Command** - Select this option to allow people to receive a list of the mailing list subscribers by emailing a listerv command to the command address. For more information, refer to Listserv Commands . Note: It is recommended that you leave this option disabled, as people or automated systems could use the user list for malicious purposes.

### **Throttling**

Throttling limits the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. Domain Administrators can use this feature to ensure a mailing list does not send out massive amounts of email through out the day, thereby possibly getting the domain blacklisted.

- **Outbound Messages per Hour** - The number of messages sent by the mailing list per hour. By default, the number of outgoing messages is 500.
- **Message Throttling Action** - When using either message or bandwidth throttling, administrators can select an action for SmarterMail to take once the particular throttling level is reached. Domain Administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of mail being sent falls beneath the throttling limit that is set. By default, mailing lists are set to Delay messages once the threshold has been reached.
- **Outbound Bandwidth MB per Hour** - The total number of MBs sent by the mailing list per hour. By default, the outgoing bandwidth is 50MB.
- **Bandwidth Throttling**

### **Digest Settings**

To reduce the number of emails mailing list subscribers receive, domain administrators can allow subscribers to sign up for digest mode or normal mode. Essentially, digest mode condenses all the messages sent to the list into a single email that is sent to subscribers on a monthly, biweekly, weekly, daily, or other defined basis. This is especially useful for very active lists or lists with a larger number of subscribers.

- **Enable digest mode** - Enable this setting to view and modify the remaining Digest settings.
- **Subject** - The subject line for the digest email.
- **Trigger Type** - The frequency of the digest emails: Daily, Weekly, Biweekly, Monthly or Manual. If Manual is selected, digest emails will only be sent when using the Send Digest button.
- **Digest Format** - The format (HTML, text, etc.) in which digest emails are sent.
- **Disable non-text attachments in digest** - Select this option to remove non-text attachments from the digest email.
- **Send Digest** - Allows an administrator the ability to send the Digest manually. **Max Message Size** - The maximum number of KBs a message can be. If the message exceeds this size, it will not be posted. By default, the max message size is unlimited. --%>

## Subscribers and Digest Subscribers

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see Mailing Lists Overview .

Individuals that sign up to receive messages from the mailing lists are called subscribers. To view a list of the mailing list subscribers, log into SmarterMail as an Administrator (List, Domain or System) and go to the Settings area based on your role. Then click on Mailing Lists in the navigation pane. Then click on the Subscribers tab.

Subscribers are categorized into two sections: the Subscribers stores the subscribers for standard mailing list postings and the Digest Subscribers stores subscribers for condensed digest emails.

### Manually Adding Subscribers

There are two primary methods for manually adding subscribers -- either regular list subscribers or digest subscribers -- to a mailing list:

- If there are only a few emails to add to the mailing list, List Administrators, Domain Administrators or System Administrators with the proper domain management permissions can manually add subscribers.
- If there are a large number of emails to add to a mailing list, Domain Administrators or System Administrators with the proper domain management permissions can upload a .CSV file containing all of the subscriber emails.

#### **Adding individual subscribers to a mailing list:**

- Log in to SmarterMail as a List Administrator, Domain Administrator or System Administrator.
- List Administrators access their mailing list(s) by clicking on Mailing Lists in the navigation pane; Domain Administrators access mailing lists in the Accounts area for their domain -- there is a Mailing Lists tab; System Administrators first have to select the Domain that has the mailing list they want to manage, then click the Accounts tab for that domain where they will see the Mailing Lists tab, just as Domain Administrators do.
- Regardless of how you get there, click on the desired mailing list. The mailing list settings will load in the content pane.
- Click the Subscribers tab. A list of subscribers to this mailing list will load in the content pane.

- Click New .
- In the Email Address field, type the subscriber(s) email address(es), one per line.
- Once all addresses have been added, click Save .

### **Adding multiple subscribers to a mailing list at once:**

It's also possible to add multiple users to a list at one time by uploading a list of users using a .CSV file. At a bare minimum, the .csv file must contain a column named "EmailAddress". Any additional columns in the .csv file will be added to the Subscriber Fields for the corresponding subscriber/email address. The Import from CSV option can be used to:

- Add new Subscribers, with or without Custom Field data.
- Update/overwrite the Custom Field values for existing Subscribers.
- Add new Custom Fields to existing Subscribers.

NOTE: If you import a CSV that contains existing Subscribers, their Custom Field data will be overwritten with the contents of the CSV.

- Log in to SmarterMail as a List Administrator, Domain Administrator or System Administrator.
- List Administrators access their mailing list(s) by clicking on Mailing Lists in the navigation pane; Domain Administrators access mailing lists in the Accounts area for their domain -- there is a Mailing Lists tab; System Administrators first have to select the Domain that has the mailing list they want to manage, then click the Accounts tab for that domain where they will see the Mailing Lists tab, just as Domain Administrators do.
- Regardless of how you got there, click on the desired mailing list.
- When the list's Options open, click on the Subscribers tab. A list of current subscribers to this mailing list will load in the content pane, if there are any.
- Click on the Actions (...) button.
- From the dropdown menu, select Import CSV File . the Upload Subscribers modal window opens.
- You can either drag-and-drop a CSV file into the modal window, or click inside the window to open File Explorer to find and "open" the file. Click Upload in the content pane toolbar.

## **Managing Subscribers**

Once a subscriber has been added to the list, you can modify their custom field values, review the other mailing lists to which they are subscribed, see the history of bounce messages they've received and reviewed the history of messages they've received.

To download the list of subscribers as a text file, click on the Actions (...), then Export CSV File .

## Posters

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

List Administrators, Domain Administrators and System Administrators (with the proper Manage Domains permissions) can restrict the posting privileges for a mailing list to Anyone, Subscribers Only or Moderators Only. In addition, they can use the Posters section to specify additional list subscribers who can post messages to the list -- these special subscribers are considered "Whitelisted" as they've been given special permission to post messages, in addition to, say, Moderators Only.

To add additional posters to a mailing list, log into SmarterMail as an Administrator (List, Domain or System) and go to the Settings area based on your role. Then click on Mailing Lists in the navigation pane and open a mailing list's configuration options. Then click on the Posters tab.

To add a new poster, click [New](#) . Enter the email address(es) of the people who can post messages to the mailing list.

### **Uploading/Downloading Subscribers**

In addition to manually adding new subscribers, it's possible to upload a text file that contains subscriber emails and any Custom Fields assigned to your subscribers. Text files should be in Comma Separated Value (.CSV) format.

Of course, since you can upload a subscriber list, you can also download one. This is especially convenient if the subscribers for one list -- or a subset of those subscribers -- is interested in another list you start up. Downloading your list subscribers, then editing it if needed, makes it simple to add subscribers to a new list.

### **Banned Users**

It's also possible to keep a list of users who are banned from posting to your mailing list. You can import subscribers to this list as well as download that list to use in others you've created. For more information, see the section on [Banned Users](#) .

## Banned Users

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.



Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

Administrators (List, Domain or System) can restrict the posting privileges for a mailing list to Anyone, Subscribers Only or Moderators Only. In addition, they can use the Banned Users section to specify additional blacklisted posters.

To prevent users from posting to a mailing list, log into SmarterMail as an Administrator (List, Domain or System) and go to the Settings area based on your role. Then click on Mailing Lists in the navigation pane and open a mailing list's configuration options. Click on the Banned Users tab.

To add a new banned user, click New . Enter the email address(es) of the people who cannot post messages to the mailing list.

## Messages

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.
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Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

Administrators can customize the system messages used for mailing lists. Some system messages, such as headers and footers, are viewable by list subscribers. Other messages are only viewable when emailing listserv commands to the mailing list username. For more information, please see [Listserv Commands](#) .

Note: Variables can be used in the footer, header and subscribe system messages. For more information on variables, see [Mailing Lists Overview](#) .

To edit a particular message, simply click on it from the list. When you do, a modal opens that will allow you to fully customize the message, as well as how that message is presented using a complete HTML editor. Once you've made your changes, be sure to save them.

- Command help email -- `LISTSERV COMMAND ONLY`. This is the default message that is returned when a listserv command is sent to the mailing list username but the command is not recognized. By default it returns information on how to properly format commands.
- Digest footer - This is the footer that is displayed when digest emails are sent to digest list subscribers.
- Digest header - This is the header that is displayed when digest emails are sent to digests list

subscribers.

- Digest separator - This is the character set (e.g., dashes) that will be used to separate messages within digest emails.
- Double opt-in successful email - This message is sent to subscribers notifying them that they were successfully subscribed to the list when the double opt-in subscription model is used.
- HELP response - LISTSERV COMMAND ONLY. This can be used to return information about the list, such as its creation date, last updated date, etc. or any other information the domain or list owner wants returned.
- LIST members response - disabled - LISTSERV COMMAND ONLY. This is returned when a particular list is set to not allow a list of subscribers to be returned. That is, the LIST command is not enabled for that list.
- LIST members response - enabled - LISTSERV COMMAND ONLY. This returns a list of subscribers for a particular list. This requires the LIST command to be set.
- LIST response - LISTSERV COMMAND ONLY. This returns a list of the mailing lists for a particular domain. This requires the LIST command to be set.
- Post failure - insufficient permissions - This email is sent to posters that do not have the proper permission to post to the list. For example, this is returned to list subscribers who reply to the list but only moderators are allowed to post.
- Post failure - invalid list password - When a list is password-protected, this message is returned when a person posting to the list provides the incorrect information.
- Post failure - list disabled - This message is returned when a user attempts to post to a list that is no longer active.
- Post failure - message too big - This is returned when a message posted to a list is larger than the maximum size set for messages.
- Posted message footer - This is the footer (information at the very bottom of the message) that is displayed on messages that are sent to list subscribers.
- Posted message header - This is the header (information at the very top of the message) that is displayed on messages that are sent to list subscribers.
- SET MODE DIGEST response - failed - LISTSERV COMMAND ONLY. This is returned when the list command that sets the digest mode for a subscriber fails.
- SET MODE DIGEST response - ok - LISTSERV COMMAND ONLY. This is returned when the list command sets the digest mode for a subscriber.
- SET MODE STANDARD response - failed - LISTSERV COMMAND ONLY. This message is returned when the list command tries to set the mode for a subscriber that is not actually subscribed to the list.
- SET MODE STANDARD response - ok - LISTSERV COMMAND ONLY. This is returned when the list command sets the standard mode (one email per list post) for a subscriber.

- SUBSCRIBE response - double opt-in required - This message is sent to subscribers to verify their subscription request when your mailing list utilized a double opt-in subscription model (recommended).
- SUBSCRIBE response - list is private - This is returned when anyone tries to subscribe to the list but the list doesn't allow for automatic subscriptions. Instead, the list owner will need to add the subscriber manually.
- SUBSCRIBE response - subscribed - This is sent to a list subscriber when they subscribe to a specific list.
- UNSUBSCRIBE response - This is sent to a user when they unsubscribe from a specific list.

## Mailing Lists | Custom Fields

This settings page is only available to Domain Administrators, Mailing List Administrators and System Administrators with the proper permissions.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#).

Mailing lists can utilize Custom Fields in order to manage information about subscribers. When a custom field has been created, a value can be applied to a specific subscriber. Then, the custom field is used as a variable in a mailing list message in order to display that custom information about the subscriber. For example, if you'd like your messages to be sent out with the subscriber's first name in the message greeting (ex. "Hello John,"), you'd first create the Custom Field then add a value for each subscriber.

To create or manage Custom Fields, log into SmarterMail as an Administrator (List, Domain or System) and go to the Settings area based on your role. Then click on Mailing Lists in the navigation pane. Open a mailing list's configuration options and click on the Custom Fields tab.

### Adding a New Subscriber Field

To add a new Subscriber Field, click the New button. A modal window will display the following options:

- Name - The name of the Subscriber Field. Note: The text entered here is used as the variable when sending subscriber fields in mailing list messages. For example, if you enter "First Name" in this field, you will need to enter #First Name# as the variable in the mailing list message.
- Default Value - Enter the text that should be automatically entered for current and new subscribers. Once the field is created, subscribers can be individually modified to change the value. Note: If a default value is not included, and the subscriber does not have their field configured, the variable will be removed from the message, leaving a blank space in its location.

## Using Custom Fields in Messages

A Custom Field can be used in mailing list messages as a type of custom variable. To enter Custom Fields as variables, the name of the field must be enclosed with a #. For example, if a Subscriber Field was created for "Customer Name", you would enter #Customer Name# in your message.

## Listserv commands

Listserv commands allow you to control the list through commands sent in email messages to the listserv command address. By default, the command address for a domain is "listserv@example.com", where example is the name of your domain. However, your system administrator may change this command address.

To send a command, compose an email to the command address with the command in the body of the message. The subject of the message is ignored.

### Available Commands

Note: Any references to listname should be replaced with the list you are trying to use.

Help listname - Replies to the email with the contents of the Help system message for that list.

List - Replies to the email with a list of all available lists.

List listname - Replies to the email with a list of all subscribers for a particular list. Note: This command can be disabled by the domain administrator.

Subscribe listname - Adds your email address to the subscribers list of the mailing list. Note: This command can be disabled by the domain administrator.

Unsubscribe listname - Removes your email address from the subscribers list for the mailing list referenced by listname.

Set mode digest listname - Sets your email address to receive emails in digest mode, which will send all messages for the list combined into one email at regular intervals.

Set mode standard listname - Sets your email address to receive emails in standard mode (the default), which will send messages one at a time to your email account.