



User Settings

Help Documentation

User Settings

Account Settings

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 options will be available:

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** - 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 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. 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** - Toggle the slider to the right 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" toggle 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.
 - **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, 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.
- **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.)
- Use sent items for autocomplete (webmail only) - SmarterMail's auto-complete feature allows users to quickly select an email address from a dropdown list when filling in the To, Cc and Bcc fields while composing an email or when adding Attendees to a calendar appointment. Select this option to automatically add the To, Cc and Bcc addresses of all outgoing messages delivered via webmail to the autocomplete list.
- 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

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:

- **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.

Regardless of which method you use, having Two-Step Authentication set for your account is a great way to keep your email communication protected. In addition, after you have set up Two-Step, SmarterMail will generate authentication codes that can be used in third-party applications, like email clients, calendar apps, live chat apps and more. You will need to use these codes in order to be able to log in (or log BACK in) to any third-party applications that you are using with your Two-Step authenticated account. You can disable Two-Step at any time by simply clicking the Disable button.

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.
- **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.

Account 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. 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.

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. Check out the SmarterTools knowledge base for more information on how to customize signatures.

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 on the . 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.

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."

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.

Compose Box

- Subject - The words or phrase that will appear in the subject of the autoresponder message (e.g. Out of Office).
 - Message Body - The message that will be automatically sent in reply to email messages.
- SmarterMail allows users to create HTML formatted autoresponders that can include stylized text, links, images and more.

Domain Policy

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.

Options

- Enable Autoresponder - Toggle the slider to the right to turn the autoresponder on.
- 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 - Toggle the slider to the right 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 - Toggle the slider to the right 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.

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.

- Add invites as tentative appointments - Select this option to enable tentative appointments.

When enabled, a meeting invite will automatically add a tentative appointment to your calendar, indicated by a dotted outline. You can then either accept or decline the invitation. (Tentative appointments will still trigger the reminder notification that was set by the organizer.)

- 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.

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.

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.

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.
- Command Line Action - This option will fire an command line action.

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 Google Drive, 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 Google Drive, 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 or IMAP.
- 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.
- Test Connection - Click this button to verify that a connection can be established using the credentials entered.

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 POP or 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.
- Test Connection - Click this button to verify that a connection can be established using the credentials entered.

Removing a Retrieval Task

To remove a retrieval task, or to simply reset the connection, 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.
- **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.
- **Test SMTP Connection** - Click this button to verify that a connection can be established using the credentials entered.

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 Enterprise uses multiple data synchronization technologies to sync account data with email clients and mobile devices, including:

- EAS is an optional add-on that syncs SmarterMail mailboxes with most smartphones and tablets and Outlook 2015.
- 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 2015 for Mac from Office 365, Microsoft Outlook 2011 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.
- The Add to Outlook feature within the SmarterMail webmail interface uses two-way synchronization technology to sync SmarterMail calendars, contacts, and tasks with Outlook 2007 or higher and provides read-only capability for Outlook 2003.

(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.

Remote Wipe

Remote wipe is a feature that allows users to reset a device synced using EAS back to its original factory settings, quickly and easily, right from the webmail interface. This is especially handy for

devices that are lost or stolen as it can prevent personal information that is stored on the device from falling into the wrong hands. The best thing is that any information stored in SmarterMail, including any notes, tasks, emails, contacts, calendar items, etc., will still be available when a new device, or even a recovered device, is re-synced with the account.

Mailbox Migration

The mailbox migration tool makes switching email providers easy by importing email, contacts and calendars (and tasks and notes, where supported) into SmarterMail from most third-party mail servers.

Importing Data with Mailbox Migration

To import data from a third-party mail server, click on Start Migration . Then follow the on-screen instructions to import the email and collaboration data to your SmarterMail mailbox. Depending on the mail server you are migrating from, you may be asked to provide the mailbox protocol (POP or IMAP), the server address, port, username and password.

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.

A Note for Office 365 Users - Migrating from Office 365 is easy. However, there are a few things that aren't as clear-cut as moving from an Exchange server. Below is a step-by-step for anyone migrating from Office 365 to SmarterMail:

- For the type of account you're going to migrate, select "Microsoft Exchange".
- For the Server Address , use "mail.office365.com".
- The Domain will be whatever domain you have set up within Office365.
- Your Username is typically just the name of the mailbox...without your domain name appended to it. (E.g., jdoe)
- the Password is just that: the password you use to log into your Office365 mailbox.
- You will need to check the Requires SSL checkbox.
- From there, the rest is easy. Just hit the Start button and your Office 365 information will start importing into SmarterMail.

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 - Toggle the slider to the right 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 My 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.

Content Filtering

Content filtering is a great way to perform actions on incoming emails that meet specific criteria. 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 the way you want to.

To access your content filtering settings, log in to SmarterMail and click on the Settings icon . Then click on Content Filtering .

Jump To:

- 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.
- Order - Content filters are executed in the order in which they appear. In addition, when a

content filter gets triggered and performs an action on a message, no other content filtering is performed on that message. In this field, enter the position number for your filter. If a filter already exists in the position number that was entered, the filter currently being edited will override that position and existing filters will adjust accordingly.

- 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 ?) - Toggle the slider to the right to enable 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.

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.