



# User Settings

Help Documentation

# 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 a user selects/sets for their account in SmarterMail is EXTREMELY important. That's because it's much more than simply what is seen in the webmail client. SmarterMail's language selection is the basis for everything: the things you see in the webmail interface as well as what's returned to an email client when you connect using Outlook, eM Client, iOS Mail and more. That includes things like settings labels, folder names, calendars and calendar appointment, contact groups, email message content, log files and essentially everything within SmarterMail. Therefore, it is extremely critical that whatever language is set in SmarterMail is the language you actually want to use. 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.

- Changing Language Settings : When a user tries to update their language, SmarterMail checks for potential conflicts prior to changing the language. For example, if a user is set to English and they have a folder named "Bandeja de entrada", if they try to change their language to Spanish, the change will not be saved and they will see a warning letting them know that the language wasn't updated to prevent an email folder name conflict. This is because "Bandeja de entrada" is the Spanish name for Inbox used in the default Spanish language translation file. If the change was saved, there would be 2 folders with the same name, which would cause issues.

- **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 of messages sent through webmail. This address will be used by receiving email clients when replying to a message. While it's possible to set the Reply-to address for a user, that user can change the Reply-to when composing a message or reply in an email client, such as Microsoft Outlook. Should they do this, that address will take precedence over what's set in the user's settings.
- **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, sub-folders and/or folders with spaces can be created as part of a Plus Address. 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. Using an underscore ( \_ ) in the folder name will create it with a space. For example, myname+acme\_newsletters will create a folder called Acme Newsletters. 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. Unlike domain administrators, who can only create auto-clean rules on the default folders created by SmarterMail, users can set up rules for any folder, including custom folders.

Setting up auto-clean rules helps users ensure that their disk space does not fill up unnecessarily. In some cases, particularly when SmarterMail is being provided by a hosting company or ISP, users may have disk space limits set for their accounts. Keeping unnecessary or unwanted email cleaned up, and freeing up space that could be used by unnecessary messages, is one way to help these users stay within the limits placed by their hosting company.

- 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, the length of time a message has been in a folder, or a particular folder's size.

### **Size of Folder vs. Age Rules**

It's possible to either set an auto-clean rule based on the size of a folder, or the age of a message (or messages) within a folder. Size-based auto-clean rules are run whenever an action is performed on a particular folder. For example, moving a message into the folder. Once that action occurs, the auto-clean rule is run, and it runs each time an action is performed. Age-based rules, however, run once per day on the FIRST folder action for that day. For example, deleting an email first thing in the morning. When you delete an email, it's moved to the Deleted Items folder, which is a folder action. At that point, if there's an age-based auto-clean rule for the Deleted Items folder, the rule is run, and then is silent until an action is performed on the next day.

When using a folder's size, it's possible to set upper and lower limits for the space used for the folder. For example, you can create an auto-clean rule so that when a folder gets larger than 50MB in size, the rule automatically deletes messages to reduce the folder's size to 5MB. When freeing up space, the total size of each message is used, which includes any message attachments.

When using Age as a guideline, there are two types of age: Message Age and Age in the Folder.

- **Message Date:** This is based on the initial receipt date of the message. So if you received a message on January 1st, and the number of days is set to 14, on January 15 the message is automatically deleted.
- **Time in Folder:** This is based on when a message is actually moved to the folder that has the auto-clean rule configured. The age of the message itself is not used. That means, if the Age in Folder is set to 14 days, it doesn't matter when the message was received. Instead, the message is deleted 14 days after it's been moved into the folder.

### **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 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

Recovery Email Address \*  
it.mycompany@gmail.com

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.)

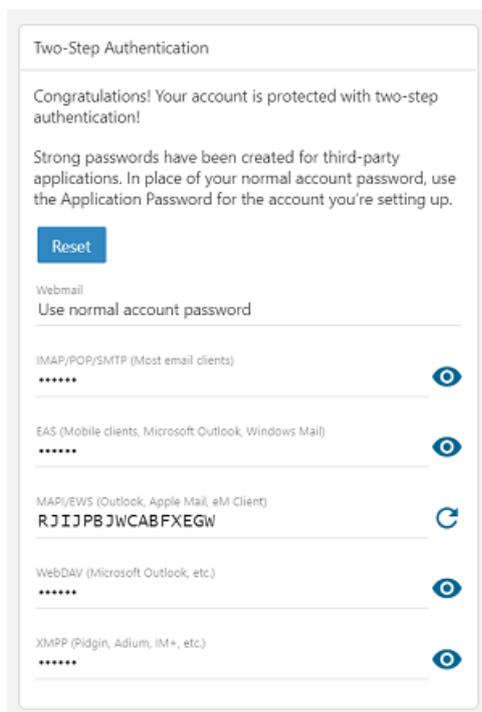
- Click Check to confirm the verification code and complete the Two-Step Authentication setup.

### 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. By default, autoresponders are sent out once per day, per sender. That means that if you receive multiple emails from the same individual in a 24 hour period, they will only get 1 automated reply. This prevents inbox spamming as well as prevents the potential for "email loops" -- such as if the person sending you a message has their own autoresponder set up, there is no chance for the 2 mailboxes to continually sending each other automated replies.

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.
- 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 autoresponse 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, 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.
- 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.

NOTE: Some content filtering actions, such as a Forward action, do not work in conjunction with Plus Addressing as content filters are run BEFORE any plus addressing commands. Using both could lead to duplicate messages or other unwanted/unnecessary behavior.

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.

There are 2 ways a user can run a content filter on demand: from the right-click/context menu for a folder, or from the Content Filter page withing Settings.

### Context Menu Option

It's possible to run a content filter on a specific folder simply by right-clicking on the folder name and selecting Run Content Filter from the context menu that appears. Once clicked, a modal opens and you are able to select the content filter to run from the dropdown, then clicking 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.

### Content Filter Settings Page

To run filter actions on an email folder, use the checkbox to select the filters that should be triggered. Then click on the Run Content Filters button. In the Run Content 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.

**Important Note :** If SPF and DKIM spam checks are enabled, SmarterMail will run those checks on ALL emails, including those from trusted senders, whitelisted IP addresses and IP bypasses. 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 an SPF or DKIM check fails on an incoming message, the trusted sender status will be bypassed, and the weights of all enabled spam checks will be applied. The specific spam check results that will bypass the trusted sender status are `SPF_Fail`, `SPF_Softfail`, `SPF_PermError`, or `DKIM_Fail`.

If the trusted sender status of an email was bypassed due to a failed SPF or DKIM check, the `TotalSpamWeight` line in the email header would appear in the following format:

```
X-SmarterMail-TotalSpamWeight: {Total Spam Weight} ({Where the trusted sender status originates}, {Reason the trusted sender status was bypassed})
```

For example:

```
X-SmarterMail-TotalSpamWeight: 9 (Trusted Sender - Domain, failed SPF)
```

This example indicates that the sender is in the domain-level Trusted Senders list, but the email received a total spam weight of 9 because the message failed the SPF check.

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.