



Settings

Help Documentation

Settings

My Settings

Account Settings

To edit your personal settings, click the settings icon . Then expand the My Settings folder and click Account Settings from the navigation pane. The user settings will load in the content pane and the following tabs will be available:

User

Use this tab to specify the following user-based settings:

- Username - The identifier the user uses to login to SmarterMail.
- Password - The corresponding password used to login to Smartermail.
- Display Name - The name displayed on outgoing messages.
- 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.
- Time Zone - The user's time zone.
- Backup Email Address - The email address to which password reset instructions will be sent if the user forgets his password.
- Disable Greylisting - Select this option to disable greylisting.

Webmail

Use this tab to specify the following webmail settings:

- Initial Page on Login - The page users will see upon logging in to SmarterMail.
- Display Format - To specify the default format in which messages are displayed, select the appropriate option from the list.
- HTML - This option will display HTML content, if present in the email. This content can include stylistic elements, like fonts or colors, as well as hyperlinks and other formatting elements.
- Text - This option will only display text. While it is less interesting (no fonts, images, etc), it is also much more secure and is faster to view than HTML.
- Sort Messages by - The order in which messages are displayed. By default, messages are displayed by date in descending in order.

- **Delete 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 regularly be emptied.
- **Auto Purge Folder** - Permanently deletes the message. Note: When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.
- **Mark as Deleted** - Flags the message for deletion, but it will not be removed until the folder is purged.
- **Mark as Deleted and Hide** - Flags the message for deletion and hides it from view, but it will not be removed until the folder is purged. Note: Be careful to monitor your disk space usage when using this option, as it may fill up with what appears to be a small number of messages.
- **Skin** - The domain or system administrator may have enabled different skins for users to choose from. To specify which skin to use, select the appropriate option from the list.
- **Preview Pane** - To specify where the preview pane displays in the webmail interface, select the appropriate option from the list.
- **Enable automatic mark as read for previewed messages** - Select this option to automatically mark previewed messages as read.
- **Disable automatic image loading in preview pane** - Select this option to prevent images when viewing messages in the preview pane.
- **Enable automatic reminder popup** - Select this option to display reminders in popup windows.
- **Enable sounds** - Select this option to enable sounds in webmail (such as when a new chat message is received).
- **Enable new message notifications** - Select this option to display a temporary notification in the webmail interface when a new message is received. This notification will display no matter which section of the interface is selected.
- **Disable reminders for appointments and tasks** - Select this option to disable appointment and task reminders.
- **Re-enable all warnings for deletions** - Select this option to display a confirmation window when items are deleted. Note: The ability to hide deletion warnings is available in the confirmation window. This setting is cookie-based so the warnings will display again if the user clears cookies or uses different browser or computer to access webmail.

Compose

Use this tab to specify the following settings for writing emails:

- **Compose Format** - To select the default format in which messages are created, select the appropriate option from the list.

- HTML - Use this option if you wish to add stylistic elements to your emails.
 - Text - Use this for a simple method of email editing. You will not be able to change colors or fonts, but your emails will generally be much smaller and readable on more email clients.
 - Compose Font - To specify the default font and font size for emails, select the appropriate option from the list.
 - Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list.
 - Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list.
 - Forwarding Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
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- 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 or fonts.
 - Embed as Attachment - Attaches the original message to the new one. The message will not appear in the body of your message.
 - Auto Save Frequency - To specify how frequently SmarterMail saves a draft of a message you are writing, select the appropriate option from the list.
 - Reply Header Type - To specify the header type, select the appropriate option from the list.
Note: For most users, basic headers will be sufficient. Basic headers include From, To, and Subject headings whereas the full header includes MIME type filter restrictions, etc.
 - Reply Text Indicator - The character appended to the beginning of each line of the original message in a message reply.
 - Enable inclusion of previous replies in reply - Select this option to embed the text of the original message in a message reply.
 - Enable sent items folder - Select this option to save all outgoing messages in the Sent Items folder. Note: If you send many messages, you may need to delete items from this folder regularly.
 - Enable read receipts by default - Select this option to create read receipts for all outgoing messages.
 - Enable trusted sender for webmail recipients - Select this option to add email addresses to which you have sent mail to your trusted senders list.
 - Enable exclusion of X-Originating_IP header - Select this option to remove your IP address from the X-Originating_IP header when sending messages via webmail.

Forwarding Use this tab to set up SmarterMail to forward received messages to another email account.

- Forwarding Address - The email address to which messages will be forwarded.
- Enable deletion of message on forward - Select this option to automatically delete messages from your SmarterMail inbox after they are forwarded.

Plus Addressing

Plus addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. Plus addressing also allows users to use special email addresses if they do not want to give out their real email 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 address user+technewsletter@example.com. When the newsletter is delivered, it will automatically be routed to the Technewsletter folder. If the folder does not exist, it will be created automatically. Note: For plus addressing to work, it is important that the folder name appears AFTER the username, but BEFORE the domain name. So the format should be: username+foldername@domain .

- Action - The action SmarterMail should take when a plus-addressed email is received.
- Move to folder - If the target folder exists, the incoming message will be placed into it. If the folder does not exist, it will be created. No more than 10 folders can be auto-created in this method during a six hour period to prevent abuse.
- Move to folder (if it exists) - If the target folder exists, the incoming message will be placed into it. Otherwise, the email will get placed in the inbox.
- Leave in Inbox - Drops the message in to your inbox.
- Enable plus addressing - Select this checkbox to enable plus addressing.

Account Profile

The information contained in your account profile is publicly available to other users on the domain if the system administrator has enabled the Global Address List (GAL). Users can access your public contact information only by accessing the GAL through webmail or LDAP. Note: LDAP is a feature available to SmarterMail Enterprise users only.

To view or edit your account profile, click the settings icon . Then expand the My Settings folder and click Account Profile in the navigation pane. Your contact details will load in the content pane.

In general, contact details are divided into four sections:

- Personal Info - Your display name, title, first name, middle name, last name, suffix, email address, instant messenger, home page, and date of birth.
- Contact Info - Your home phone number, work phone number, mobile phone number, pager number, home and work fax numbers, and home address.
- Work Info - Your company name, job title, department, office, work address, and website URL.
- Additional Info - Type any additional details about yourself.

Auto-responder

Users can set up auto-responders to automatically send a prewritten response when an email message is received. They are commonly used to notify senders that the recipient is out of the office or on vacation.

To set up an auto-responder, click the settings icon . Then expand the My Settings folder and click Auto-Responder in the navigation pane. The auto-responder settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Enable auto-responder - Select this checkbox to turn the auto-responder on.
- Disable responses to indirect mail - By selecting this checkbox, the auto-responder 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 auto-responder.
- Limit responses to once daily - Select this checkbox to ensure an email address only receives the auto-responder message once per day, even if they send you multiple messages. If you disable this option, every email a particular address sends to will get responded to. 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.

Auto-Responder Message

Use this tab to specify to customize the auto-responder message. Note: This tab is only available if the auto-responder is enabled.

- Subject - The words or phrase that appears in the subject of the auto-responder message (e.g. Out of Office).
- Compose Format - To specify whether the auto-responder displays in plain text or HTML,

select the appropriate option from the list.

- Message - Type the text of the auto-responder in this field. For example: 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.

Trusted Senders

This setting allows users to list specific email addresses (such as jsmith@example.com) or domains (such as example.com) that will be exempted from spam filtering. Email addresses or domain names can be added to your list of trusted senders. This can prevent mail from friends, business associates, and mailing lists from being blocked and lets the system know that these messages come from a trusted source. Note: The email address for messages that you unmark as spam are automatically included on your trusted senders list.

To view your trusted senders list, click the settings icon . Then expand the My Settings folder and click Trusted Senders in the navigation pane. A list of trusted senders will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new trusted sender.
- Edit - Edits an existing trusted sender.
- Delete - Permanently deletes the selected trusted sender(s).

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.

To access your signature settings, click the settings icon . Then expand the My Settings folder and click Signatures in the navigation pane. The signature settings will load in the content pane and the following tabs will be available:

Mappings

Use this tab to assign a signature to your mailbox. Note: Domain administrators can enforce signatures on a domain-wide basis. In such cases, users may not be able to map a signature to their SmarterMail mailbox. Users will still be able to map signatures to SMTP mailboxes added to their account.

Signatures

Use this tab to create or edit signatures. To create a new signature, click New in the content pane

toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the content pane toolbar.

Events Overview

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to administrators and users that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. With notifications, administrators don't have to query for the status of the items in the system--they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterMail: user-level events and system-level events:

- User-level events are specific to each user.
- System-level events can only be set by system administrators.

To view events, click the settings icon . For user events, expand the My Settings folder and click Events in the navigation pane. For domain-level events, expand the System Settings folder and click Events in the navigation pane. Events can also be viewed by event group or category (collaboration, email, domain, etc.). Any configured events will load in the content pane. Note: Only system administrators can access system-level events.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the content pane toolbar.
- Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered.

The following actions are available from the content pane toolbar:

- New - Creates a new event.
- Edit - Allows the user/system administrator to make changes to an event's settings.
- Delete - Permanently deletes the selected event(s).
- Search - Allows the user/system administrator to search for a specific event.

To view the settings for a specific event, simply double-click the event and the event settings will load in the content pane.

Synchronized Devices

SmarterMail Enterprise uses multiple data synchronization technologies to sync mailbox data with email clients and mobile devices:

- Microsoft Exchange ActiveSync is an optional add-on that syncs SmarterMail mailboxes with most smartphones.
- Exchange Web Services is an optional add-on that seamlessly syncs SmarterMail messages, contacts, calendars and tasks to third-party email clients like Microsoft Outlook 2011 for Mac and Outlook 2012 for Windows.
- SyncML is a platform-independent information synchronization standard that syncs SmarterMail contacts, calendars, and tasks with Outlook, Thunderbird, and most smartphones. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.
- CalDAV is an extension of the WebDAV protocol that syncs SmarterMail calendars with Macs, iPads, iPhones, and other devices/applications that use the technology. Windows Phone 8 will include native support for CalDAV and there are apps for Android that support CalDAV as well. More information on CalDAV implementations can be found on Wikipedia
- 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. Windows Phone 8 will include native support for CardDAV and there are apps for Android that support CardDAV as well. More information on CardDAV implementations can be found on Wikipedia
- 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](#) .

To view a list of devices synced with SmarterMail, click the settings icon . Then expand the My Settings folder in the navigation pane and click Synchronized Devices . A list of all previous sync connections will load in the content pane and the following columns will be available:

- Name - The identifier for the device or protocol connecting to SmarterMail. Note: Users may not be able to edit the name of some devices.
- Type - The synchronization protocol used to connect with SmarterMail. Examples include Exchange ActiveSync, Exchange Web Services, SyncML and Add To Outlook. Some protocol

types may match the Name. Description - A description of the synchronized device. --%>

- Last Sync - The date the device or protocol last connected to SmarterMail.

In general the following options are available from the content pane toolbar:

- Edit - Edits the device connection information. Note: Some devices, such as CardDav or CalDav, cannot be edited.
- Delete - Deletes the selected sync connection(s). Note: In general, users should not delete a sync connection, as this may cause the device to stop functioning with SmarterMail. Deleting a connection is only recommended if you are experiencing issues and want to completely re-configure the device's connection to SmarterMail.

Filtering

Folder Auto-clean

Folder Auto-clean is a method for limiting how much of your account disk space is used by the Junk E-Mail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, you can help ensure that your account does not fill up unnecessarily. Messages are deleted from the folders in the order that they were received so that older messages get deleted first.

To access the folder auto-clean settings, click the settings icon . Then expand the My Settings and Filtering folders and click Folder Auto-Clean in the navigation pane. Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

The folder auto-clean settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Use default auto-clean settings - Select this checkbox to adopt the auto-clean policy set by your email host or domain administrator. Note: If the administrator changes the policy, yours will automatically change with too.
- Override auto-clean settings for this account - Select this checkbox to override the settings set by your administrator. Any changes you make will not be affected if the administrator changes their policy, unless they disable user overrides.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this

tab. If you chose to override the settings, you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

These options will be visible if size is chosen:

- Folder Size Before Auto-clean - The maximum size of the folder. Once the folder reaches this size, the auto-clean process is started and older messages (messages that were received the longest time ago) are deleted.
- Folder Size After Auto-clean - The goal size of the folder. When auto-cleaning, SmarterMail will delete older messages until the folder reaches this size. Note: This number should always be lower than the "before" number.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

These options will be visible if date is chosen:

- Mail Age - The maximum number of days mail will stay in the selected folder before deletion.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Content Filtering

Content filtering is an advanced method of performing actions on emails that meet specific criteria. For example, you can use content filters to delete messages with certain attachments, forward messages from a specific email address to another account, or even alter the subject of specific types of email. Content filtering is very flexible in order to allow you to filter messages the way you want to.

To access your content filtering settings, click the settings icon . Then expand the My Settings and Filtering folders and click Content Filtering in the navigation pane.

To add a new filter, click New in the content pane toolbar. The content filter wizard will load in the content pane.

To edit an existing filter, select the desired filter and click Edit in the content pane toolbar.

Note: Content filters are executed in the order in which they show up in the list. When a content filter gets triggered and performs an action, no other content filtering is performed on that message. To change the order, click on the arrows next to a filter.

Content Filter Wizard

The New Content Filter wizard is three pages long, and it will walk you through each step necessary to create the filter.

Step 1 - Filter Criteria

In this step of the wizard, choose the type of things that the filter will look at. Possible filter criteria types are listed at the end of this help topic. Multiple criteria can be chosen, and you can choose in the next step whether all criteria must be met, or only one of the criteria for the filter to activate.

Step 2 - Filter Type and Criteria Details

Choose whether this filter requires one criterion to be met from each and every section, or just one of the criteria in any section to be met, before an action is performed. Then choose whether you will be using any wildcards in your search strings. Usually, wildcards will not be necessary, but there are times when some people may want them.

For each of the criteria you chose in step 1, you will be able to enter details. Many types of content filters allow lists of items to be entered in, and these will be indicated. For example, if you chose to filter on From Address, you can enter multiple email addresses in the box (one per line) and if a message is from any of them, that criteria will be met.

You also have the ability to reverse the logic of a specific criteria item by changing the "matches" box to "does not match."

Step 3 - Rule and Actions

A summary of your content filter rule will appear near the top of the page. Check that it is filtering the way you intend, and enter a name for the rule so that you can easily identify it later.

Choose one or more actions to take when a message matches this filter. The available actions are explained below:

- Delete message - Deletes the message so that it will never arrive at your Inbox. Messages deleted through content filtering are not recoverable.
- 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 to folder - Delivers the incoming message to the folder you choose from the drop-down list. If you later delete that folder and leave the content filter active, the filter will automatically create the folder when the action is triggered.
- Prefix subject with comment - Useful for categorizing emails, the subject line will be altered to include the text you specify in the Comment box.
- Embed header line into message - Includes an email header into the message, which can be

useful when performing additional filtering through Outlook or another email client. Headers should be formatted like "X-someheadername: value"

- Copy message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- Reroute message to another email address - Forwards the message to another email address instead of this one. Will not store a copy of the email in your own account.

Content Filter Types

From Address

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

Contains Specific Words or Phrases

- Subject
- Body Text
- Subject or Body Text
- From Address
- To Address
- Email Headers
- 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

- Message over Size
- Message under Size
- Received in Date Range
- Sent through a Specific Server (by IP)
- Spam Probability
- Flagged as High Priority
- Flagged as Normal Priority
- Flagged as Low Priority
- Message is Automated (no return address)

Spam Filtering

SmarterMail includes many antis spam measures that will help keep your inbox free of unwanted mail. Your domain administrator has probably already set up some basic spam filtering options.

To view your spam filtering settings, click the settings icon . Then expand the My Settings and Filtering folders and click and click Spam Filtering in the navigation pane. The spam filtering settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Use default spam settings - Select this checkbox to accept the default spam options provided by your domain administrator.
- Override spam settings for this account - Select this checkbox to customize the way spam is handled and to override the settings created by the domain administrator.

Actions

When you override the spam options set by your system 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. Note: If you are using the default spam options that were set up by your administrator, these settings cannot be edited.

Current Weights

Each type of spam check has an associated weight that factors into the spam probability of a message. When an email comes in, all of the checks listed are run, and for each check that the message fails, the weight is added to the overall score of the email. The thresholds for each spam probability are examined, and the email is placed into the appropriate category.

Sharing

Shared Resources

This feature is only available in SmarterMail Enterprise.

SmarterMail Enterprise allows users to share their email folders and collaboration items with other users on the domain. If you share any of the following items, they are called shared resources:

- Email folders
- Contacts
- Calendars
- Tasks
- Notes

To see a list of items you are sharing with others, click the settings icon . Then expand the My Settings and Sharing folders and click Shared Resources in the navigation pane. A list of shared resources will load in the content pane.

In general, the following options are available in the content pane toolbar:

- New - Creates a new shared resource.
- Edit - Edits an existing shared resource.
- Delete - Permanently deletes the ability to share the selected item(s).

Mapped Resources

This feature is only available in SmarterMail Enterprise.

SmarterMail Enterprise allows users to share their email folders and collaboration items with other users on the domain. If a user shares any of the following items with you, they are called mapped resources:

- Email folders
- Contacts
- Calendars
- Tasks
- Notes

To see a list of items other users are sharing with you, click the settings icon . Then expand the My Settings and Sharing folders and click Mapped Resources in the navigation pane. A list of mapped resources will load in the content pane.

In general, the following options are available in the content pane toolbar:

- **Attach** - Attaches the selected mapped resource(s) to your account so they are accessible. For example, if you attach a co-worker's calendar to your account, you can access this mapped resource from the contacts area of the webmail interface by clicking the contacts selector and choosing the appropriate option.
- **Detach** - Edits an existing mapped resource.
- **Edit** - Permanently removes the selected item(s) from the mapped resources list.

Advanced Settings

Auto-complete

Because most users send email to the same recipients, SmarterMail automatically pulls email addresses from your Sent Items folder, your contacts, the Global Address Directory (GAL), aliases and mailing lists and saves them separately from emails in your contacts list. These auto-saved email addresses are then used to auto-complete the To, Cc and Bcc fields when applicable.

To view the list of email addresses used for the auto-complete feature, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Auto-complete in the navigation pane. A list of email addresses will load in the content pane.

Addresses that were pulled from your Sent Items folder can be deleted from the auto-complete list by selecting the addresses and clicking Delete in the content pane toolbar. Note: Addresses pulled from the GAL, aliases, mailing lists or your contacts list cannot be deleted from the auto-complete list.

Calendar Settings

To view your calendar settings, click the settings icon . Then expand the My Settings and Advanced Settings Folder and click Calendar Settings in the navigation pane. The calendar settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- **Default Calendar View** - To specify the default calendar view (daily, weekly, monthly, or all appointments), select the appropriate option from the list.
- **Enable display of weekends in the weekly view** - Select this option to set the weekly calendar view to include the weekends.

- Enable display of weekends in the monthly view - Select this option to set the weekly calendar view to include the weekends.

Tasks

Use this tab to specify the following task-related settings:

- Enable display of 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.
- Enable display of 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.
- Disable display of completed tasks - Select this option to remove completed tasks from the calendar view.

Weather

U.S. users can view the 7-day weather forecast on their calendar. To enable this option, type your postal code in the appropriate field and select the Enable weather checkbox. Weather forecasts are provided by the National Weather Service.

Visible Hours

SmarterMail users can use this tab to customize their calendar to display their typical hours. For example, if you typically schedule appointments from 8 a.m. to 5 p.m., you can configure the visible hours to correspond with those times. Users can also configure the visible hours for each day of the week to allow for flexibility in your schedule.

Mailbox Migration

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

To access the mailbox migration tool, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Mailbox Migration . The mailbox migration tool will open in a new window.

Follow the on-screen instructions to import email and collaboration data from a third-party mail server to your SmarterMail mailbox. Depending on the mail server you are migrating from, you may be asked to provide the mailbox protocol (POP, 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 that are available for migration are purely dependent upon the service you're migrating from.

SmarterMail can not 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:

- When asked for the mailbox protocol, select "Exchange 2007 SP1 or Later".
- On the Account Settings portion of the migration you will need to log in to your Office 365 account and to get the Server Address for your Office 365 account. To do this, simply log in to your account and get it from the log in URL. For example, if your log in URL is something like <https://ch1prd0412.outlook.com/owa>, you will want to use "chr1prd-412.outlook.com" as the Server Address you're migrating from.
- Use the full email address you use to log in to Office 365 as your Username . For example, JDoe@example.com.
- Use your domain name as the Domain for the migration. For example, if you log in with JDoe@example.com you'll just need to use example.com for the domain.
- You will need to check the Requires SSL checkbox.
- From there, the rest is easy. Just finish up the migration wizard and your Office 365 information will now be in SmarterMail.

Message Retrieval

Message Retrieval allows users to access email on another server through the SmarterMail Web interface. Note: This feature is only available to users if their system administrator has enabled message retrieval.

To view your message retrieval settings, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Message Retrieval in the navigation pane.

POP Retrieval

SmarterMail's POP retrieval service will download email messages from another server via POP3 and deliver them to your SmarterMail mailbox. When creating a new account for POP message retrieval, the following options are available:

- Server Address - The address for the email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 110.
- Username - The identifier used to authenticate with the email server.
- Password - The corresponding password used to authenticate with the email server.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server.

Note: If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve to check for new messages.

- Destination Folder - The folder in which messages downloaded from the server are saved.
- 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.
- Requires SSL - Select this option if the connection to the server must be SSL.
- Enable Spam Filtering - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server

IMAP Retrieval

SmarterMail's IMAP retrieval service will download email messages from another server via IMAP and deliver them to your SmarterMail mailbox. When creating a new account for IMAP message retrieval, the following options are available:

- Server Address - The address for the email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 143.
- Username - The identifier used to authenticate with the email server.
- Password - The corresponding password used to authenticate with the email server.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server.
Note: If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve to check for new messages.
- Folder Transfer Method - The method by which SmarterMail imports any email folders from the server.
- Requires SSL - Select this option if the connection to the server must be SSL.

Notification Profiles

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

To view a list of current notification profiles, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Notification Profiles . Your notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Edits an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- **Notification Profile Name** - The name of the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent.
- **Enable** - Checking this box will enable email notifications.
- **SMS Email Address(es)** - The mobile device email address to which notifications are sent.
- **Enable** - Checking this box will enable SMS notifications.
- **Enable Reminders** - Checking this box will display reminders for tasks and appointments in a popup window in webmail.

SMTP Accounts

Setting up an SMTP account allows you to send email from an external server from within Smartermail. Generally, you will also want to set up the corresponding Message Retrieval information.

To view your message retrieval settings, click the settings icon . Then expand the My Settings and Advanced Settings folders and click SMTP Accounts in the navigation pane.

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

- **Server Address** - The address for the external email server for which you want to connect.
- **Port** - The port used to connect to the email server. By default, the port is 25.
- **Display Name** - The name that appears in the From field of emails.
- **Email Address** - The email address that corresponds to the external email server.
- **Username** - The identifier used to authenticate with the external email server.
- **Password** - The corresponding password used to authenticate with the external email server.
- **Encryption** - The type of encryption required by the external email server.
- **Enable Authentication** - Select this option if SMTP authentication is required to send mail from this email address.

Domain Settings

General Settings

This settings page is only available to domain administrators.

Domain administrators will use this section to adjust any general domain settings. To access this section, click the settings icon . Then expand the Domain Settings folder and click General Settings in the navigation pane. The general settings will load in the content pane and the following tabs will be available:

Skin

Use this tab to choose a default skin for all of the mailboxes on a specific domain. Note: If the system administrator does not allow users or domain administrators to override the system settings, this tab will not be visible.

- Default Skin - Select the skin you wish to set as the default from the list.
- Enable Users to Override Skin - Select this option to allow users to choose their own mailbox skin.

Sharing

When a user adds a member from the Global Address List as an attendee on a calendar appointment, SmarterMail can alert the user of any potential scheduling conflicts. In addition, the user can view an Availability window to review the times that their attendee is free/busy. The following setting impacts whether the calendar availability of GAL members is shown in the calendar conflicts and availability window:

- Enable public availability for all users - This setting is enabled by default and will allow users on the domain to review scheduling conflicts and availability for members in the Global Address List. When unchecked, domain users' scheduling information will not be displayed in the appointment window.

Mailing Lists

Use this tab to specify the following mailing list settings:

- Webmail URL - The URL for the SmarterMail login page. Note: URLs should include the http:// prefix. For example: http://mail.example.com/
- Enable - Select this option to override the server's configured hostname for use in mailing list communications.

- Deletion Bounce Threshold - The number of times a message to a specific subscriber may bounce before the subscriber removed from the mailing list. By default, the threshold is set to 5.
- Enable - Select this option to enable the deletion bounce threshold. By default, this setting is enabled.

Users

This settings page is only available to domain administrators.

An email user account represents a person's actual mailbox. User accounts can receive email, send email, and login to the Webmail interface.

To view a list of users on a domain, click the settings icon . Then expand the Domain Settings folder and click Users in the navigation pane. A list of users will load in the content pane.

To edit a user's settings, select the desired user and click Edit in the content pane toolbar. The user settings will load and the following tabs will be available:

User

Use this tab to specify the following user-based settings:

- Username - The identifier the user uses to login to SmarterMail.
- Authentication Mode - The authentication method used to login to SmarterMail.
- Password - The corresponding password used to login to Smartermail.
- Display Name - The name displayed on outgoing messages.
- 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.
- Time Zone - The time zone the used.
- Mailbox Size Limit - The maximum size of the mailbox. By default, the maximum mailbox size is 100 MBs.
- Disable user - Select this option to disable the account.
- Enable domain administrator access - Select this option to allow the user to edit domain settings.
- Disable password changes - Select this option to prevent the user from changing the login password.
- Enable ActiveSync - Select this option to allow this account to sync via the Exchange ActiveSync add-on.
- Hide from Global Address List - Select this option to remove the user from the Global Address

List. Use this option on accounts that are not tied to real people, such as support@example.com.

- Enable POP retrieval - Select this option to allow users to download email from POP mail servers.
- Enable IMAP retrieval - Select this option to allow users to download email from IMAP mail servers.
- Enable outgoing mail signing - Select this option to enable mail signing for outgoing messages.

Webmail

Use this tab to specify the following Webmail settings:

- Initial Page on Login - The page users will see upon logging in to SmarterMail.
- Display Format - To specify the default format in which messages are displayed, select the appropriate option from the list.
- HTML - This option will display HTML content, if present in the email. This content can include stylistic elements, like fonts or colors, as well as hyperlinks and other formatting elements.
- Text - This option will only display text. While it is less interesting (no fonts, images, etc), it is also much more secure and is faster to view than HTML.
- Sort Messages by - The order in which messages are displayed. By default, messages are displayed by date in descending in order.
- Auto Refresh Rate - How frequently SmarterMail checks for new messages.
- Items per Page - The number of emails that appear on each page.
- Upcoming Appointments - The number of days that appear in the Upcoming Appointments section of the My Today Page.
- Delete 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 regularly be emptied.
- Auto Purge Folder - Permanently deletes the message. Note: When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.
- Mark as deleted - Flags the message for deletion, but it will not be removed until the folder is purged.
- Mark as deleted and hide - Flags the message for deletion and hides it from view, but it will not be removed until the folder is purged. Note: Be careful to monitor your disk space usage when using this option, as it may fill up with what appears to be a small number of messages.

Reports Chard Type - To specify how reports are displayed, select the appropriate option from the list. --%>

- Enable automatic preview - Select this option to automatically display the first message of the folder you are viewing.
- Disable automatic image loading in preview pane - Select this option to prevent images when viewing messages in the preview pane.
- Enable automatic reminder popup - Select this option to display reminders in popup windows.
- Disable reminders for appointments and tasks - Select this option to disable appointment and task reminders.
- Enable animations - Select this option to enable animation for items in the webmail interface.

Compose

Use this tab to specify the following settings for writing emails:

- Compose Format - To select the default format in which messages are created, select the appropriate option from the list.
 - HTML - Use this option if you wish to add stylistic elements to your emails.
 - Text - Use this for a simple method of email editing. You will not be able to change colors or fonts, but your emails will generally be much smaller and readable on more email clients.
 - Compose Font - To specify the default font and font size for emails, select the appropriate option from the list.
 - Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list.
 - Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list.
 - Forwarding 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 or fonts.
 - Embed as Attachment - Attaches the original message to the new one. The message will not appear in the body of your message.
 - Auto Save Frequency - To specify how frequently SmarterMail saves a draft of a message you are writing, select the appropriate option from the list.
 - Reply Header Type - To specify the header type, select the appropriate option from the list.
- Note: For most users, basic headers will be sufficient. Basic headers include From, To, and

Subject headings whereas the full header includes MIME type filter restrictions, etc.

- Reply Text Indicator - The character appended to the beginning of each line of the original message in a message reply.
- Enable inclusion of previous replies in reply - Select this option to embed the text of the original message in a message reply.
- Enable sent items folder - Select this option to save all outgoing messages in the Sent Items folder. Note: If you send many messages, you may need to delete items from this folder regularly.
- Enable read receipts by default - Select this option to create read receipts for all outgoing messages.
- Enable trusted sender for webmail recipients - Select this option to add email addresses to which you have sent mail to your trusted senders list.

Forwarding Use this tab to set up SmarterMail to forward received messages to another email account.

- Forwarding Address - The email address to which messages will be forwarded.
- Enable deletion of message on forward - Select this option to automatically delete messages from your SmarterMail inbox after they are forwarded.

Groups

This feature is only available in SmarterMail Enterprise edition.

Groups are used to specify permissions for shared items and for the Global Address List. To specify which groups the user belongs to, select the appropriate groups. Note: Only domain administrators can assign users to groups. If the domain administrator has not defined any groups within the User Groups settings page, no groups will be available.

Throttling

Throttling limits the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. Use this tab to edit the following throttling settings:

- Outgoing Messages per Hour - The number of messages sent by the domain per hour. By default, the number of outgoing messages is 5,000.
- Enabled - Check this box to enable throttling for outgoing messages.
- Outgoing Bandwidth per Hour - The total number of MBs sent by the domain per hour. By default, the outgoing bandwidth is 100.
- Enabled - Check this box to enable throttling for bandwidth.

Plus Addressing

Plus addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. Plus addressing also allows users to use special email addresses if they do not want to give out their real email 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 address user+technewsletter@example.com. When the newsletter is delivered, it will automatically be routed to the Technewsletter folder. If the folder does not exist, it will be created automatically. Note: For plus addressing to work, it is important that the folder name appears AFTER the username, but BEFORE the domain name. So the format should be: username+foldername@domain .

- Action - The action SmarterMail should take when a plus-addressed email is received.
- Move to folder - If the target folder exists, the incoming message will be placed into it. If the folder does not exist, it will be created. No more than 10 folders can be auto-created in this method during a six hour period to prevent abuse.
- Move to folder (if it exists) - If the target folder exists, the incoming message will be placed into it. Otherwise, the email will get placed in the inbox.
- Leave in Inbox - Drops the message in to your inbox.
- Enable plus addressing - Select this checkbox to enable plus addressing.

Service Access

This tab indicates a user's access to POP, IMAP, SMTP and webmail services.

- Enable POP access - Select this option to allow the user to download mail using POP3.
- Enable IMAP access - Select this option to allow the user to download mail using IMAP.
- Enable incoming SMTP Access - Select this option to allow users to receive email from external domains.
- Enable outgoing SMTP access - Select this option to allow users to send email to external domains.
- Enable webmail access - Select this option to allow users to login to SmarterMail from the webmail interface.

Email Aliases

This settings page is only available to domain administrators.

An email alias is simply a forwarding email address. Using an email alias allows a message addressed to one mailbox to be redirected to another mailbox.

For example, in a working environment with multiple email addresses, the office may want to make a central email address that distributes messages to all personnel. The alias `workplace@example.com` can be made for messages to be sent and then distributed to all of the employees.

To view a list of email aliases for the domain, click the settings icon . Then expand the Domain Settings folder and click Aliases in the navigation pane. A list of email aliases will load in the content pane.

To create a new email alias, click New in the content pane toolbar. To edit an existing email alias, click Edit in the content pane toolbar. The email alias settings will load in the content pane and the following options will be available:

- Name - The name of the alias. This name will be used to create the email alias address. For example, if you named the alias "info" and the domain was "example.com," the email alias address would be `info@example.com`.
- Disable greylisting - Select this option to disable greylisting for the email alias.
- Emails - Type the full email address(es) of the users who should receive the messages sent to this alias.

Note: Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address since no email is ever actually stored for the alias. Emails are just sent to the list of addresses provided for the alias.

Chat History Search

This settings page is only available to domain administrators.

A major advantage of SmarterMail is that it stores all chats, regardless of whether the chats occur within the webmail interface, using a third-party client or a combination of both. Domain administrators have the ability to perform custom searches by date range, by the users involved in the chat conversations, by specific keywords or phrases used during a chat or a combination of all of these variables. Note: Chat history search is configured by the system administrator. For more information, see the Features area of the All Domains page of SmarterMail Help.

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

- Date Range - The date range you want to use for your search. You can either type in the date or click on the calendar icon and use SmarterMail's calendar control to select your start and end date.
- From - The username or email address of the person who originated the chat.
- To - The username or email address of the person who was the recipient of the chat.

- Text - Any word or phrase that was used during a chat. For example, "2012 sales numbers" or "product ID 33489".

Trusted Senders

This settings page is only available to domain administrators.

This setting allows domain administrators to list specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. This can prevent mail from friends, business associates, and mailing lists from being blocked and lets the system know that these messages come from a trusted source.

To view the trusted senders list for the domain, click the settings icon . Then expand the Domain Settings folder and click Trusted Senders in the navigation pane. A list of trusted senders will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new trusted sender.
- Edit - Edits an existing trusted sender.
- Delete - Permanently deletes the selected trusted sender(s).

Signatures

This settings page is only available to domain administrators.

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

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

To access the signature settings for a domain, click the settings icon . Then expand the Domain Settings folder and click Signatures in the navigation pane. The signature settings will load in the content pane and the following tabs will be available:

Mappings

Use this tab to assign a signature to specific domains. To allow users the ability to create and use their own signatures, select the Enable users to override checkbox. Note: If this setting is disabled, users must use the domain-wide signature.

Signatures

Use this tab to create or edit signatures. To create a new signature, click New in the content pane toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the content pane toolbar.

Notification Profiles

This settings page is only available to domain administrators.

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

Although users can set up their own notification profiles, some organizations may find it beneficial to create a notification profile that applies to all domain administrators. You can use this page to do so.

To view a list of notification profiles, click the settings icon . Then expand the Domain Settings folder and click Notification Profiles in the navigation pane. Your notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Edits an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- **Notification Profile Name** - The name of the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent.
- **Enable** - Select this option to enable email notifications.
- **SMS Email Address(es)** - The mobile device email address to which notifications are sent.

- Enable - Select this option to enable SMS notifications.
- Enable Reminders for all domain administrators - Select this option to send a reminder to all domain administrators when the event is triggered.

Domain Shared Resources

This settings page is only available to domain administrators.

SmarterMail allows domain administrators to create shared resources for all users of a specific domain. In addition, this is where domain administrators set up shared conference room schedules.

The following columns are available:

- Checkbox - Use these boxes to select multiple resources. A resource must be selected before choosing an action from the content pane toolbar.
- Resource - The name of the resource.
- Type - The types of resource created.
- Number of Permissions - When a resource is created, a domain administrator can enable specific permissions for users or groups. This column displays how many permissions were set

Adding a Shared Resource

Adding a shared resource is a fairly straightforward process. Simply click New in the content pane to open the add resource window. The following options are available:

- Name - The name of the resource. Note: If this resource is a conference room it is best to name the resource the same as the conference room designation.
- Type - The type of resource being added.
- Resource is a conference room - Select this checkbox to designate the resource as a conference room.

It is also possible to edit existing resources. Simply select the checkbox and click Edit from the content pane.

Filtering

Domain Folder Auto-clean

This settings page is only available to domain administrators.

Folder Auto-clean is a method for limiting how much of a user's disk space is used by the Junk E-Mail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, domain

administrators can help ensure that user accounts do not fill up unnecessarily. Messages are deleted from the folders in the order that they were received so that older messages get deleted first.

To access the folder auto-clean settings, click the settings icon . Then expand the Domain Settings and Filtering folders and click Folder Auto-Clean in the navigation pane. Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

The folder auto-clean settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Use default auto-clean settings - Select this option to adopt the auto-clean policy set by your email host or domain administrator.
- Override auto-clean settings for this account - Select this option to override the settings set by your administrator. Any changes you make will not be affected if the administrator changes their policy, unless they disable user overrides.
- Enable users to override auto-clean settings - Select this option to allow users to create their own auto-clean policies.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab. If you chose to override the settings, you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

These options will be visible if size is chosen:

- Folder Size Before Auto-clean - The maximum size of the folder. Once the folder reaches this size, the auto-clean process is started and older messages (messages that were received the longest time ago) are deleted.
- Folder Size After Auto-clean - The goal size of the folder. When auto-cleaning, SmarterMail will delete older messages until the folder reaches this size. Note: This number should always be lower than the "before" number.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

These options will be visible if date is chosen:

- Mail Age - The maximum number of days mail will stay in the selected folder before deletion.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Domain Content Filtering

This settings page is only available to domain administrators.

Domain content filtering allows you to create the same types of content filters as you can on the user level, but the filters added will be applied to all members of a domain. The evaluation of domain content filters happens before the evaluation of account-specific content filters. For more information about how to add a content filter, refer [Content Filtering](#) .

Note: Be aware that many users will prefer to set their own content filtering. You may want to minimize filtering at the domain level to only filter items that affect the entire domain.

Spam Filtering

This settings page is only available to domain administrators.

SmarterMail includes many advanced antispam measures that will help protect your users from unwanted email. The system administrator has probably already set up some default spam options.

To view your spam filtering settings, click the settings icon . Then expand the Domain Settings folder and click Spam Filtering in the navigation pane. The spam filtering settings will load in the content pane and the following tabs will be available:

Options

Use this tab to set the following spam filtering options for the domain:

- Use default spam settings - Choose this option to accept the default spam options provided by your system administrator. The settings will be displayed for your reference.
- Override spam settings for this domain - Select this option to customize the way spam is handled. Spam check weights and actions will become overridable by end users. More information about the types of actions allowed can be found below.

Actions

When you override the spam options set by your system 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.

Current Weights

Each type of spam check has an associated weight that factors into the spam probability of a message. When an email comes in, all of the checks listed are run, and for each check that the message fails, the

weight is added to the overall score of the email. The thresholds for each spam probability are examined, and the email is placed into the appropriate category.

Mailing Lists

Mailing Lists

This settings page is only available to domain administrators.

A mailing list is a collection of names and email addresses used by an individual or an organization to send messages to multiple recipients. For example, many companies use mailing lists to email newsletters, promotional offers, or information about product updates to subscribers. NOTE: SmarterMail can accommodate mailing lists of up to 75,000 subscribers. Anything greater than that should be managed by a third-party mailing list service provider such as Constant Contact or MailChimp.

To view the mailing lists for your domain, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. A list of the mailing lists for the domain will load in the content pane.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple mailing lists. Mailing lists must be selected before choosing an action from the actions toolbar.
- List Name - The name of the mailing list.
- Moderator - The "owner" of the mailing list.
- Description - A brief summary of the mailing list.
- Subscribers - The number of people currently subscribed to the mailing list.
- Digest Subscribers - The number of subscribers that receive a digest of mailing list postings.

The following actions are available from the content pane toolbar:

- New - Clicking this button will allow the domain administrator to create a new mailing list.
- Edit - Clicking this button will allow the domain administrator to edit an existing mailing list's settings.
- Delete - Clicking this button will allow the domain administrator to delete an existing mailing list.
- Send Digest - Clicking this button will allow the domain administrator to send a digest of mailing list postings.

Mailing List Messages

SmarterMail's mailing list feature combines the functionality of discussion and announcement lists and can be used to send both types of messages. To create a new mailing list message, simply compose a new email message and send it to the mailing list email address.

By default, when a subscriber reads a mailing list message, the From field in the subscriber's inbox will display the email address of the individual that sent the mailing list message; the To field will display the list name or mailing list email address; and the Reply To field will display the mailing list email address or the email address of the individual that sent the message, depending on the list settings. Note: Domain administrators and mailing list moderators can customize the From, To, and Reply To fields by editing the mailing list settings.

Create a New Mailing List

This settings page is only available to domain administrators.

To view the mailing lists for a specific domain, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. To create a new mailing list, click the New button in the content pane toolbar. You can also edit an existing mailing list by selecting the desired mailing list and clicking the Edit button in the content pane toolbar.

List Settings

Use this tab to edit the following mailing list settings:

- Name - The name of the mailing list. SmarterMail will use the name to create the email address associated to this mailing list.
- Moderator - The "owner" of the mailing list. The moderator must be a user in your domain.
- Password -To restrict subscribers from sending emails to a mailing list, type a password in this field. Note: To send emails to a mailing list that is password protected, you must send the password in the subject enclosed by brackets and colons. For example, Subject: [:password:] Attention all subscribers).
- Enabled - Check this box to enable password protection for this mailing list.
- Subject Prefix - The optional text that will appear in the subject line. SmarterTools recommends using a subject prefix for discussion lists to help subscribers easily filter through posts.
- Enabled - Check this box to enable the subject prefix for this mailing list.
- Allowed Posters - An email that is sent to the mailing list (and therefore to its subscribers) is considered to be "posted". Use this field to specify who has access to post to the list.

- **Anyone** - Setting the list to "anyone" means that when anyone, regardless of whether they are subscribed to the list or not, sends an email to the list, it will be sent out to all members. Note: This setting can cause abuse if it is not closely monitored.
- **Subscribers Only** - Setting the list to "subscribers only" allows the list subscribers, and only the list subscribers, to send and receive posts. The moderator will still be permitted to post.
- **Moderators Only** - If the moderator is set as the post option, only the moderator will be able to post to the list. This means that no one else, not even list subscribers, will be able to post.
- **List To Address** - The email address that will display in the To field when a subscriber receives a mailing list message.
- **List From Address** - The email address that will display in the From field when a subscriber receives a mailing list message.
- **List Reply To Address** - The email address that will display in the Reply To field when a subscriber receives a mailing list message. When a subscriber hits 'Reply' to the message, this address will receive the reply. If a subscriber hits 'Reply All' all list recipients will receive the reply.
- **Max Message Size** - The maximum number of KBs a message can be. If the message exceeds this size, it will not be posted. By default, the max message size is unlimited.
- **Disable Mailing List** - Check this box to disable the mailing list.
- **Description** - A brief summary of the mailing list.

Options

Use this tab to enable or disable the following mailing list optionsL

- **Enable Digest Mode** - Select this option to enable digest mode. For more information, see the Digest Settings tab.
- **Enable Header** - Select this option to append header text to the beginning of the mailing list message. Note: To edit the header text, click the System Messages tab and edit the appropriate system message.
- **Enable Footer** - Select this option to append footer text to the end of the mailing list message. Note: To edit the footer text, click the System Messages tab and edit the appropriate system message.
- **Send Subscribe Email** - Select this option to automatically send an email to new subscribers.
- **Send Unsubscribe Email** - Select this option to automatically send an email response to unsubscribe requests.
- **Enable Poster Whitelist** - Select this option to allow whitelisted email addresses to post to the mailing list.
- **Enable SUBSCRIBE Command** - Select this option to allow people to subscribe to the mailing

list by emailing a listserv command to the command address. For more information, refer to Listserv Commands . Note: If this option is disabled, only list administrators can add new subscribers to the mailing list.

- **Enable LIST Command** - Select this option to allow people to receive a list of the mailing list subscribers by emailing a listerv command to the command address. For more information, refer to Listserv Commands . Note: It is recommended that you leave this option disabled, as people or automated systems could use the user list for malicious purposes.
- **Enable Unsubscribe from Subject** - Select this option to allow subscribers to unsubscribe from the mailing list by sending an email to the list with the word "unsubscribe" in the subject line. It is recommended that you usually keep this option enabled, as it will reduce complaints of abuse by giving subscribers a way to quickly opt-out of the mailing list.
- **Enable Double Opt In** - Select this option to automatically send an email confirmation to new subscribers.
- **Disable List Error Replies** - Select this option to prevent the system from automatically replying to incorrect listserv commands.

Digest Settings

To reduce the number of emails mailing list subscribers receive, domain administrators can allow subscribers to sign up for digest mode or normal mode. Essentially, digest mode condenses all the messages sent to the list into a single email that is sent to subscribers on a monthly, biweekly, weekly, daily, or other defined basis. Use this tab to edit the following digest settings:

- **Last Sent** - The date and time a digest email was sent to subscribers.
- **Subject** - The subject line for the digest email.
- **Trigger Type** - The frequency of the digest emails.
- **Digest Format** - The format (HTML, text, etc.) in which digest emails are sent.
- **Disable non-text attachments in digest** - Select this option to remove non-text attachments from the digest email.
- **Enable Header** - Select this option to append header text to the beginning of the mailing list message. Note: To edit the header text, click the System Messages tab and edit the appropriate system message.
- **Enable Separator** - Select this option to place a separator between messages in a digest email.
- **Enable Footer** - Select this option to append footer text to the end of the mailing list message. Note: To edit the footer text, click the System Messages tab and edit the appropriate system message.

System Messages

Use this tab to edit system messages for mailing lists. Note: This tab is not visible if you are creating a new mailing list. Variables can be used in the footer, header and subscribe system messages.

Throttling

Throttling allows domain administrators to limit the number of messages and/or how much bandwidth a mailing list can use. Use this tab to edit the following throttling settings:

- **Outgoing Messages per Hour** - The number of messages sent by the mailing list per hour. By default, the number of outgoing messages is 5,000.
- **Enabled** - Check this box to enable throttling for outgoing messages.
- **Outgoing Bandwidth per Hour** - The total number of MBs sent by the mailing list per hour. By default, the outgoing bandwidth is 100.
- **Enabled** - Check this box to enable throttling for bandwidth.

System Messages

Use this tab to edit system messages for mailing lists. Some system messages, such as headers and footers, are viewable by list subscribers. Other messages are only viewable when emailing listserv commands to the mailing list username. These messages are noted below, and more information is available to system administrators in their section of the SmarterMail help documentation. Note: This tab is not visible if you are creating a new mailing list. Variables can be used in the footer, header and subscribe system messages.

Mailing List System Messages

- **digestfooter** - This is the footer that is displayed when digest emails are sent to digest list subscribers.
- **digestheader** - This is the header that is displayed when digest emails are sent to digests list subscribers.
- **digestseparator** - This is the character set (e.g., dashes) that will be used to separate messages within digest emails.
- **disabledlistemail** - This message is returned when a user attempts to post to a list that is no longer active.
- **doubleoptin** - This message is sent to subscribers to verify their subscription request when your mailing list utilized a double opt-in subscription model (recommended).
- **doubleopinreply** - This message is sent to subscribers notifying them that they were successfully subscribed to the list when the double opt-in subscription model is used.

- `faildtoresetdigestmode` - LISTSERV COMMAND ONLY. This message is returned when the list command attempts to set digest mode but digest mode is not enabled for the specific list.
- `failedtoresetstandardmode` - LISTSERV COMMAND ONLY. This message is returned when the list command tries to set the mode for a subscriber that is not actually subscribed to the list.
- `footer` - This is the footer (information at the very bottom of the message) that is displayed on messages that are sent to list subscribers.
- `header` - This is the header (information at the very top of the message) that is displayed on messages that are sent to list subscribers.
- `help` - LISTSERV COMMAND ONLY. This can be used to return information about the list, such as its creation date, last updated date, etc. or any other information the domain or list owner wants returned.
- `helpmessage` - LISTSERV COMMAND ONLY. This is the default message that is returned when a listserv command is sent to the mailing list username but the command is not recognized. By default it returns information on how to properly format commands.
- `insufficientpostingpermissionemail` - This email is sent to posters that do not have the proper permission to post to the list. For example, this is returned to list subscribers who reply to the list but only moderators are allowed to post.
- `invalidlistpasswordemail` - When a list is password-protected, this message is returned when a person posting to the list provides the incorrect information.
- `listcommandresponse` - LISTSERV COMMAND ONLY. This returns a list of subscribers for a particular list. This requires the LIST command to be set.
- `listoflists` - LISTSERV COMMAND ONLY. This returns a list of the mailing lists for a particular domain. This requires the LIST command to be set.
- `maxmessagesizeexceededemail` - This is returned when a message posted to a list is larger than the maximum size set for messages.
- `nolistcommand` - LISTSERV COMMAND ONLY. This is returned when a particular list is set to not allow a list of subscribers to be returned. That is, the LIST command is not enabled for that list.
- `privatelist` - This is returned when anyone tries to subscribe to the list but the list doesn't allow for automatic subscriptions. Instead, the list owner will need to add the subscriber manually.
- `setdigestmode` - LISTSERV COMMAND ONLY. This is returned when the list command sets the digest mode for a subscriber.
- `setstandardmode` - LISTSERV COMMAND ONLY. This is returned when the list command sets the standard mode (one email per list post) for a subscriber.
- `subscribe` - This is sent to a list subscriber when they subscribe to a specific list.
- `unsubscribeemail` - This is sent to a user when they unsubscribe from a specific list.

Throttling

Throttling allows domain administrators to limit the number of messages and/or how much bandwidth a mailing list can use. Use this tab to edit the following throttling settings:

- **Outgoing Messages per Hour** - The number of messages sent by the mailing list per hour. By default, the number of outgoing messages is 5,000.
- **Enabled** - Check this box to enable throttling for outgoing messages.
- **Outgoing Bandwidth per Hour** - The total number of MBs sent by the mailing list per hour. By default, the outgoing bandwidth is 100.
- **Enabled** - Check this box to enable throttling for bandwidth.

Subscribers

This settings page is only available to domain administrators.

Individuals that sign up to receive messages from the mailing lists are called subscribers. To view a list of the mailing list subscribers, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Subscribers in the navigation pane. A list of subscribers will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple mailing lists. Mailing lists must be selected before choosing an action from the actions toolbar.
- **Email Address** - The email address of the subscriber.
- **Bounces** - The number of bounced messages to the subscriber.

The following actions are available from the content pane toolbar:

- **New** - Clicking this button will allow the domain administrator to add a new subscriber.
- **Edit** - Clicking this button will allow the domain administrator to edit subscriber details.
- **Delete** - Clicking this button will allow the domain administrator to delete a subscriber.
- **Search** - Clicking this button will allow the domain administrator to search for a specific subscriber by email address or by any defined subscriber fields.
- **Upload** - Clicking this button will allow the domain administrator to upload a list of subscribers to the mailing list. Note: Only CSV files can be uploaded.
- **Download** - Clicking this button will allow the domain administrator to download the list of subscribers as a text file.

For step-by-step instructions on adding subscribers to a mailing list, please refer to the KB article [How To - Add Subscribers to Mailing Lists](#). To edit an existing subscriber's details, select the desired subscriber from the list and click Edit in the content pane toolbar.

Note: Individuals that opted to receive the digest mode will not be included in the Subscribers list. To view a list of digest subscribers, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. Select the desired mailing list and click Edit. Then click Subscribers in the content pane toolbar and click Digest Subscribers .

Subscriber Fields

This settings page is only available to domain administrators.

Use subscriber fields to create custom fields to gather and manage information about subscribers. Subscriber fields are also used as variables in mailing list messages and can be used to include personal information about the subscriber when conducting a mail merge.

Advanced Settings

Domain Aliases

This settings page is only available to domain administrators.

A domain alias is an alias for a secondary domain name that points to an existing email account on the server under an existing primary domain name.

For example, a full email address requires a user name and a domain name (ex. `user@example.com`). If you add a domain alias on a secondary domain like "example-alias.com" then not only will "user@example.com" be valid, but the same mailbox will also work with "user@example-alias.com". If an email was sent to both emails then the "user" mailbox would get two copies of the emails.

Note: Messages cannot be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.

To view a list of domain aliases, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click then select Domain Aliases in the navigation pane.

To create a new domain alias, click New in the content pane toolbar. The domain alias settings will load in the content pane and the following options will be available:

- Name - The name of the domain alias. The name will be used to create the domain alias email address. For example, if the name of the alias is "example2," the domain alias email address will

be user@example2.com.

- Points To - The domain the alias redirects to.
- Verify MX record in DNS before add - Select this option to check that the mail exchange record for the domain is pointing to the server. Note: This option is only available to system administrators and prevents users from "hijacking" mail from valid domains. For example if this check were not in place a user could add a domain alias of example.com. Then, any mail sent from the server to "anything@example.com" would go to the domain with the example.com domain alias, rather than to the actual domain.

Mail Signing

This settings page is only available to domain administrators.

Mail signing protocols, such as DomainKeys and DKIM signing, verify the authenticity of a message and can be used to protect users from phishing schemes or spam attacks.

To edit the mail signing settings, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click Mail Signing in the navigation pane.

Options

Use this tab to edit the following options:

- Enable DomainKey Signing - Select this option to authenticate email with DomainKeys headers.
- Enable DKIM Signing - Select this option to to authenticate email with DKIM headers.

Certificate

Use this tab to edit the following settings:

- Selector - Type any identifier you like in this field. It is recommended the key is changed once every 12 months.
- Key Size - The size of the key. Remember, the larger the key, the stronger it is.

DomainKeys Signing

Use this tab to specify how closely you want the system to monitor messages in transit.

- nofws - This is the default and will allow basic in-transit changes to messages.
- Simple - This is more strict and will not allow as many in-transit changes to messages.

DKIM Signing

Use this tab to specify how closely you want the system to monitor messages in transit.

- Body Canonicalization - The method used to monitor in-transit changes to the body of a message.
- Header Canonicalization - The method used to monitor in-transit changes to the header of a message.
- Hash Algorithm - The method used to verify the DKIM signature.
- Header Field Signing - The header fields included in the hash algorithm. This is further defined by header fields.
- Header Fields - The header fields included in the hash algorithm.

Import LDAP Users

This feature is only available to domain administrators running SmarterMail Enterprise.

Domain administrators can add new SmarterMail users via the LDAP protocol. To import new users, type the LDAP binding string in the field.

User Groups

This feature is only available to domain administrators running SmarterMail Enterprise.

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

By default, there are permanent user groups that cannot be edited:

- Everyone - All users on the domain belong to this group automatically.
- Administrators - All users that are marked as domain administrators for this domain belong to this group.

To view the user groups for the domain, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click User Groups in the navigation pane. A list of user groups will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new user group.
- Edit - Edits the members of the selected user group.
- Delete - Permanently deletes the selected user group(s).

Default User Settings

This settings page is only available to domain administrators.

Default user settings apply to all new email users added in your domain. Editing the default settings does not change users that are already in place in your domain.

The default user settings are almost identical to those found when adding a user. For more information on these settings, refer to [Users](#) .

User Propagation

This settings page is only available to domain administrators.

Use this section to apply global default settings to some or all of the users on a domain. To access user propagation, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click user Propagation in the navigation pane. The default user settings will load in the content pane. For more information on these settings, refer to [Users](#) .

To apply some or all of the default settings to some or all of users on the domain, select the appropriate settings and click Propagate Now .