



# Email

Help Documentation

# Email

## Email Overview

SmarterMail users can send and receive email messages from anywhere in the world using any computer with a Web browser and Internet access. To login to SmarterMail simply use the link to the webmail interface login page provided by your domain administrator or system administrator. On the login page, type your full email address and password in the appropriate fields and click Login .

Depending on your account settings, either your SmarterMail inbox or the My Today Page will load.

To help you understand the different areas of your inbox, we created a simple inbox interface diagram that lists the various features and viewing areas of the SmarterMail webmail interface.

## Navigating Your Inbox

To sort messages, click on the appropriate column header for either a descending or ascending sort order for that column. For example, clicking the Size column header will sort items in order of size. Click the header again and the sort will go in the opposite direction.

In general, the following columns are available in the content pane:

- **Checkbox** - Use these boxes to select multiple messages. Messages must be selected before choosing an action from the actions toolbar.
- **From** - The sender of the email message.
- **Subject** - The subject of the email message.
- **Date** - The date and/or time the mail system received the email.
- **Size** - The size of the email in kilobytes.
- **Status and attachment Indicators** - The status icons inform the user of what actions have been taken for each message in their inbox and they appear just to the left of the message size. The icons are as follows: a blue arrow pointing left indicates a reply; a green arrow pointing right indicates a forward; the calendar indicates a new appointment invite or appointment invite response; a paperclip indicates the message has an attachment.
- **Follow-up Flag** - If the message is marked for follow-up, the flag icon next to the message size will be red. If the message is not marked for follow-up, the flag icon will have a gray outline.

## Performing Email Actions

In general, the following options are available from the navigation pane toolbar:

- **Actions** Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder. NOTE: - Users should create new folders in the root of the

folder tree and NOT inside their Inbox. This is because many email clients have a hard time syncing with folders that are created inside a user's Inbox.

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

- New - Click this button to create a new email message.
- Actions - Click this button and select the appropriate option to mark messages, move messages, forward multiple messages or block/unblock senders.
- Mark - Click this button and select the appropriate option to mark the selected message(s) as read, unread, follow-up, no follow-up, spam, or not spam.
- Read - Marks the selected message(s) as read and changes the status indicator appropriately.
- Unread - Marks the selected message(s) as unread and changes the status indicator appropriately. This can be useful for reviewing messages at a later time.
- Follow-up - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next the message to mark it for follow-up.
- No follow-up - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next to a message marked for follow-up to remove the follow-up flag.
- Spam - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with the Commtouch Premium Antispam add-on, messages marked as spam will be sent to Commtouch for evaluation.
- Not Spam - Marks the selected message(s) as not spam and automatically adds the email address to your trusted senders list.
- Move - Moves the selected message(s) to any available folder. Note: You can also drag-and-drop messages to an available folder.
- Forward - Forwards the selected message(s). Note: This option is best used when trying to forward multiple messages as .eml attachments.
- Block Sender - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted. You can edit the action taken for this filter, should you so desire.
- Unblock Sender - Allows the sender of the selected message(s) to begin sending messages to

the account again by removing the address from the Internal Blocked Senders content filter.

- Delete - Click this button and select the appropriate option to delete, undelete, purge deleted messages, or delete all messages in a folder.
- Delete - Moves the selected message(s) to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Undelete - Retrieves deleted messages from your Deleted Items folder provided the system hasn't been purged yet. Note: After the system purges any items marked for deletion, you can't retrieve the deleted messages.
- Purge Marked as Deleted - Permanently deletes the messages in your Deleted Items folder. Note: This action cannot be undone.
- Delete All Messages in Folder - Moves all of the messages within a selected folder to the Deleted Items folder. This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not. This option is most useful in folders like Junk E-Mail or Deleted Items.
- View - Click this button and select the appropriate option to filter messages or refresh the content pane.
- Refresh - Manually refreshes the list of messages in the content pane.
- Filter - Filters messages based on the criteria you choose: messages that have been read/unread, replied to or not or forwarded.

In general, the following options are available from the preview pane toolbar:

- Reply - Allows you to reply to the the sender only.
- Reply All - Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
- Forward - Sends the message to someone else.
- Delete - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Add - Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- View - Allows you to view the original message in alternate formats, including HTML (default), as text only, view the raw content of the message (including the header) or view the header only. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.

- Print - Prints the message.
- View in new window button - Clicking this opens the message in a new browser window.

## Reading Email Messages

SmarterMail displays whether you have unread email in your inbox, or in any folders, a number of different ways. Note: The first three notification types are demonstrated in the email interface diagram .

- The number of unread messages will display next to the name of the folder in the navigation pane.
- Unread messages display as bold in the content pane.
- The number of unread messages in your inbox displays as part of the Email icon in the icon bar, to the left of the content pane.
- A new message notification, also known as a "toast notification," will temporarily display in the lower left corner of the webmail interface. Note: This feature can be disabled from the Account Settings page.

To view the contents of a message, simply click the desired message and it will load in the preview pane. You can also double-click the message and it will open in a separate pop-up window.

In general, the following options are available from the preview pane toolbar:

- Reply - Allows you to respond to the sender only.
- Reply All - Allows you to respond to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
- Forward - Allows you to send the message to a third-party, not in the To or Cc fields.
- Delete - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Move - Moves the selected message(s) to any available folder.
- Mark - Click this button and select the appropriate option to mark the selected message(s) as follow-up, no follow-up, or spam.
- Follow-up - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately.
- No follow-up - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately.
- Spam - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message

and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with the Commtouch Premium Antispam add-on, messages marked as spam will be sent to Commtouch for evaluation.

- **Add** - Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#).
- **View** - By default, SmarterMail displays messages in HTML format because it provides formatting and markup capabilities that are not available in plain text. However, there may be times when you want to view the message in a different format or you need to view more than the message content. The different view options are as follows:
  - **HTML** - Displays the message in HTML format, which allows for colors, fonts, graphics, and other formatting.
  - **Text** - Displays the message in plain text, which only allows text content with no special formatting or graphics.
  - **Raw Content** - Displays the content of the email exactly as the server received it. This is helpful if you cannot view the message in any other display mode.
  - **Header** - Displays the header of the message, which indicates the path the email took to get to your email account, along with several other pieces of information.
  - **Print** - Prints the message in whatever View you're in. For example, if you're viewing the raw content of the message then hit the print button, you will print the raw content.
  - **Close** - If a message is opened in a new window, this closes the window.

## Downloading Email Attachments

If the message has an attachment, a paperclip will display in the header of the message. In addition, an attachments tab will display under the message header in the preview pane. To view a file that was attached to a message, click the attachments tab and then click the appropriate file.

SmarterMail also makes it easy for users to search for messages with attachments. To quickly view all incoming and outgoing messages with attachments, click **All Attachments** at the bottom of the navigation pane.

## Composing Email Messages

There are several ways to compose email messages in SmarterMail, whether you are writing a new message, replying to an existing message or forwarding a message.

## Creating a New Message

To create a new message, click New in the navigation pane toolbar or click New Message from the icon bar. This will open a new message window that you will use to compose the email message.

The following fields will appear in the header of the message:

- **From** - Select the email address from which the message will be sent and/or the signature to use in this message. Note: This field only displays if the user has multiple addresses from which messages can be sent in SmarterMail (SMTP accounts or domain aliases) or has multiple signatures configured for the account. If the domain administrator has disabled the ability to override domain-level signatures, the user cannot choose an alternative signature for their SmarterMail email address.
- **To** - Type the email address for each primary recipient you want to receive your email. Multiple addresses can be used, simply separate each with a comma or semi-colon. Alternatively, click To in order to open your address book/contacts list and select recipients from there. SmarterMail Enterprise users can change the address book used to select email addresses from the Global Address List. Note: When entering addresses into the To, Cc, and Bcc fields, SmarterMail will auto-complete addresses by referencing your contacts list, mailing lists, aliases or the Global Address List.
- **Cc** - Type the email addresses of recipients that should receive a carbon copy of the message. Alternatively, click Cc in order to open your address book/contacts list and select recipients from there.
- **Bcc** - Type the email addresses of recipients that should receive a blind carbon copy of the message. Alternatively, click Bcc in order to open your address book/contacts list and select recipients from there. Note: Emails listed in this field will be concealed from the complete list of recipients (those listed in the To and Cc fields). For this reason, it is common practice to use the Bcc field when addressing a very long list of recipients or a list of recipients that should not (necessarily) know each other.
- **Subject** - Type the subject of the email.

The following options are available in the toolbar of the new message window:

- **Send** - Sends your message to the designated recipients.
- **Save as Draft** - Saves the message in its current state to the Drafts folder without actually sending it. This is useful if you need to continue writing the message at a later time.
- **Attach Files** - Allows you to attach files to the message. When files are attached to an outgoing message, a file manager will display at the bottom of the new message window. The file manager will display the name, size, and upload status of the file. Attachments must reach an

upload status of 100% before the item is actually attached to the message. In addition, files that are attached to messages should NOT contain commas as this will corrupt the upload and attachment. Note: To remove an attached file prior to sending the message, click the trash icon in the file manager.

- Link From Storage - Uses SmarterMail's File Storage feature and inserts a link to a file saved on the server that the recipient can use to download the file. For more information, see File Storage Overview .
- Flags - Specifies delivery options and/or marks the message for follow-up.
- Message Priority - Specifies the importance of the message. By default, messages have a normal level of priority.
- Request a Read Receipt - Sends an email confirmation to the sender when the recipient opens the message.
- Mark for Follow-up - Marks the message for follow-up. For more information, see Marking Email for Follow-ups .
- Cancel - Cancels the message and closes the new message window.

## Replying to Email Messages

Alternatively, you may want to reply to the sender or to all of the recipients of a message. SmarterMail gives users two options for replying to a message:

- Reply - Addresses a response to the sender only.
- Reply All - Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.

When replying to a message, SmarterMail automatically fills in the address fields with the email addresses of the recipients from the original message, the subject field with the subject from the original message preceded by "Re" (which means "regarding" or "in regards to"), and the text box with the text from the original message. All other message options are the same as when composing a new message.

## Forwarding Email Messages

You may also want to simply forward a message to a third-party, someone not already copied on the original message. This is very easy to do:

- Forward - Allows you to send the message to a third-party, not in the To or Cc fields.

When forwarding a message, SmarterMail automatically fills in the subject field with the subject from the original message preceded by "Fwd" (which means "Forward"), and the text box with the text from the original message. All other message options are the same as when composing a new message.



## Additional Options

- **Delete** - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- **Move** - Moves the selected message(s) to any available folder.
- **Mark** - Click this button and select the appropriate option to mark the selected message(s) as follow-up, no follow-up, or spam.
- **Follow-up** - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately.
- **No follow-up** - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately.
- **Spam** - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with the Commtouch Premium Antispam add-on, messages marked as spam will be sent to Commtouch for evaluation.
- **Add** - Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- **View** - By default, SmarterMail displays messages in HTML format because it provides formatting and markup capabilities that are not available in plain text. However, there may be times when you want to view the message in a different format or you need to view more than the message content. The different view options are as follows:
  - **HTML** - Displays the message in HTML format, which allows for colors, fonts, graphics, and other formatting.
  - **Text** - Displays the message in plain text, which only allows text content with no special formatting or graphics.
  - **Raw Content** - Displays the content of the email exactly as the server received it. This is helpful if you cannot view the message in any other display mode.
  - **Header** - Displays the header of the message, which indicates the path the email took to get to your email account, along with several other pieces of information.
  - **Print** - Prints the message in whatever View you're in. For example, if you're viewing the raw content of the message then hit the print button, you will print the raw content.
  - **Close** - If a message is opened in a new window, this closes the window.

## Searching Email Messages

As time passes, finding a specific email can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find emails quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the messages within the folder you are viewing for matches and display the results in the content pane. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

To search multiple folders at once or to search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Advanced Search Overview](#) .

## Deleting Email Messages

SmarterMail has two different methods for deleting messages. You can either drag and drop messages from a folder to Deleted Items or delete them using the Delete menu.

The action SmarterMail takes when you delete a message depends on the option you choose for the Delete Action on the Webmail tab in your Account Settings . These options include:

- Move to Deleted Items folder - When items are deleted they are moved to the Deleted Items folder. If the Deleted Items folder does not exist, it will be created automatically the first time you delete a message.
- Auto-purge folder - When using IMAP or webmail and messages are deleted from a folder, they are only marked as deleted. Messages are not physically removed from the folder until they are purged. This option will automatically purge the folder after deleting 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 - When the message is deleted with this option, the message remains in the current folder, but will be crossed out and marked as deleted. If the folder is then purged, all items marked for deletion will be removed.
- Mark as deleted and hide - With this option, any message that has been marked as deleted will be hidden from view in webmail. This will allow you to keep deleted messages without seeing them every time you log into your mailbox. Note: It is important to keep an eye on your email account disk usage when using this option, as your mailbox may be fuller than you realize.

It is important to note that the action taken for deleted items will ONLY be taken when deleting items through webmail. Deleting an item from Outlook or another email client will NOT use the setting that

you choose. Note: When your email client connects to SmarterMail via POP3, any emails that are marked as deleted are automatically purged. To prevent this from happening, select the Move to Deleted Items folder option to avoid accidentally purging deleted items.

## Undeleting Messages

Didn't mean to delete a message? You can retrieve deleted messages from your Deleted Items folder as long as the system hasn't been purged yet. Just open the Deleted Items folder and select the desired message(s). Then drag the selected message(s) to your Inbox or another folder. Note: Your system administrator can permanently remove the messages in your Deleted Items folder at any time without warning, so don't delete messages if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted messages.

## Effects of Folder Auto-clean

Your system administrator may have established auto-clean policies that may delete older junk e-mail, deleted items, and/or sent items when these folders get too large. However, they may have left the option available for you to override auto-clean settings. For more information, see [Folder Auto-clean](#) .

## Marking Email for Follow-up

One method for managing email messages in SmarterMail is by flagging them so that they can be dealt with at a later time. For example, if you can't respond to an important message right away, you can flag that message as soon as you read it. This allows you to easily see that the message requires follow-up action.

There are a couple of ways for users to flag a message. The first is to simply click on the flag icon at the far right side of the message list in the content pane in webmail. Secondly, users can select the desired message and click the Actions menu in the content pane toolbar, then click Mark and click Follow-up . In both instances, the flag icon will turn red and a the message will also appear in the follow-up view, giving you easy access to all messages that require a further action.

It should be noted that the ability to flag messages in SmarterMail is primarily intended to help users easily identify messages that need follow-up. The functionality is supported through the IMAP protocol and some sync protocols, such as the Microsoft Exchange ActiveSync add-on, so that flagged messages will sync with email clients like Outlook as well as email clients on some mobile devices.

## Finding Flagged Messages

Although flags help messages stand out in a list, it may be difficult to find a specific flagged message if you have a lot of messages in your inbox. To quickly view all messages marked for follow-up, expand By Type and click Follow-up in the navigation pane.

## Removing a Follow-up Flag

To unmark a message for follow-up, select the desired message and click the Actions menu in the content pane toolbar. Then click Mark and click No Follow-up . The flag icon will turn white and the message will no longer appear in the follow-up view. Note: Users can also toggle the follow-up flag on and off by clicking the flag from the content pane.

## Linking Email to Tasks

Email exchanges can often result in the need for one or two new tasks. For example, an email exchange with a vendor may require updates to price sheets or shipping requirements. Perhaps an email from a significant other mentions an upcoming birthday or anniversary. Because of this, SmarterMail includes the ability to create a new task right from within an email message. This is called "linking" an email message to a task.

To link a task to a message, first you'll want to open and view the desired message. From the preview pane, click the Add menu and then click Task . This will open a new task window that you will use to create the task. Once the new task has been saved, a tasks tab will display at the top of the message window. Clicking on this tab will allow you to see all the tasks that are linked to the message.

## Finding Messages with Linked Tasks

To quickly view all emails that are linked to tasks, expand By Type and click Linked to Tasks in the navigation pane.

## Managing Email Folders

On first glance, SmarterMail users will notice that their mailbox has five special-purpose, permanent folders that can't be removed or renamed:

- **Inbox** - All incoming messages automatically go to your Inbox folder. You can read your mail in the Inbox, then delete it, move it to another folder or leave it in the Inbox. Note: If you have set up content filtering for your mailbox, incoming messages may bypass your Inbox per your content filtering settings.
- **Deleted Items** - When you delete messages, by default they're moved to the Deleted Items folder. (Just know that, this default action can change based on your settings - see Deleting Email Messages for more information). Messages in the Deleted Items folder can be deleted at any time without warning (depending on any auto-clean settings your system administrator has in place), so it's best if you don't delete messages if you think you'll want them later. Note: The Deleted Items folder is the default folder SmarterMail creates for deleted items. When migrating from other email systems to SmarterMail, the migration may create a different folder for deleted

items based on what that email system uses as its default.

- Drafts - This folder holds messages that you've composed but haven't sent yet. A message saved in your Drafts folder stays there until you either send it or delete it.
- Junk E-mail - Messages SmarterMail believes to be junk mail bypass your inbox and go to the Junk E-mail folder. You should periodically check this folder to ensure that valid messages were not accidentally delivered to the Junk E-mail folder. When valid email is delivered to the Junk E-mail folder, select the message and click the Actions menu in the content pane toolbar. Then click Mark and select Not Spam .
- Sent Items - All outgoing messages are automatically saved to your Sent Items folder, making it easy to review or resend a message if necessary. Note: This folder only displays if it has been enabled in account settings. In addition, messages sent from a third-party client such as Outlook will not be saved in the Sent Items folder.

## Creating Email Folders

To make your email easy to manage, SmarterMail lets users create as many personal mail folders as they want. Personal folders help users organize incoming and outgoing messages in ways that make sense to the individual user. Note: When creating new folders, DO NOT create sub-folders within your Inbox. While technically possible, many third-party email clients and most mobile devices can not sync sub-folders that are part of a user's Inbox.

To create a new folder, click Actions in the navigation pane toolbar and select New Folder . This will open a new folder window. In the Parent field, select the appropriate directory to save the folder to. In the Folder field, type the name of the new folder. Folder names can include letters, numbers, and the hyphen (-), space ( ), and underline ( \_ ) characters only. Note: Using a backslash character ( \ ) when naming a new folder will create both a parent and a sub-folder. For example: Family\mom will create a "Family" parent folder with a "mom" sub-folder within Family. Then click Save .

To make your SmarterMail folders available from a third-party email client such as Microsoft Outlook, when you set up the account in your client you will need to set it up using IMAP as your incoming mail server type. If you use POP mail, you only have access to your SmarterMail inbox, not any personal mail folders you created to organize messages. IN addition, when using syncing protocols like Microsoft Exchange ActiveSync (EAS), folders will sync as well with whatever mobile or desktop client you're setting up with EAS.

## Moving Messages to Another Folder

Moving messages between folders in SmarterMail is easy. You can either drag and drop messages from one folder to another or move them using the Actions menu.

To move messages using the Actions menu, first open the folder containing the message(s) you want to move. Then select the desired message(s) and click the Actions menu in the content pane toolbar. Click Move and select the name of the destination folder. The message(s) will automatically move into the folder you selected.

## Renaming and Deleting Folders

You can change the name of a personal mail folder anytime or delete it completely when you no longer need it.

To rename a folder, select the appropriate folder in the navigation pane. Click Actions in the navigation pane toolbar and select Rename Folder . In the New Folder Name field, type the name of the new field. You can also change the directory that the folder is saved to by selecting another directory in the Parent field. Then click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click Actions in the navigation pane toolbar and select Delete Folder . Then click OK to delete the folder and all of its contents.

## Message Archive Search

This feature is available to domain administrators and/or system administrators using SmarterMail Enterprise.
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Message archiving is a method of storing all email traffic for a domain -- either incoming messages, outgoing messages or both -- in a separate location on the mail server. Typically, this feature is used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002 or other regulatory compliance.

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

When message archiving is set up for a specific domain, that domain's administrator will see a Message Archive Search option in the navigation pane when they click on the Email icon. It will generally appear under My Today Page . Domain administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

System administrators can perform a message archive search by clicking on the manage icon and then clicking Message Archive Search in the navigation pane. System administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

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