



# Settings

Help Documentation

## Settings

### My Settings

#### Account Settings

Account Settings contain basic information about the email user, including the friendly "Display Name" as well as information for forwarding and reply-to addresses. The information in some of these fields are also available to fill variables used when creating Signatures for users of the Professional Edition of SmarterMail.

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 used to login to SmarterMail. This will be the personalized part of the full email address, such as the "JDoe" part of JDoe@example.com.
- Password - The password used to login to Smartermail. This will only appear if the authentication method used for the account is something other than Active Directory.
- Display Name - The name that is associated with the username and that is also 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. Generally, this email address will need to be separate from this account - possibly a GMail or Yahoo! email address, or even the default email address of a domain administrator.
- Disable Greylisting - Select this option to disable greylisting .

#### Webmail

Use this tab to specify the following webmail settings:

- Initial Page on Login - The page you see upon logging in to SmarterMail. You can either set this for My Today Page or your inbox.
- Display Format - To specify the default format in which messages are displayed, select the appropriate option from the list. Options include:
  - 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, images 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 be regularly 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 does not move messages to the Deleted Items folder and messages remain until the folder is purged.
    - Mark as Deleted and Hide - Flags the messages for deletion and hides them from view, but they 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. The Default skin is the standard blue skin that SmarterTools includes with all products.
  - Preview Pane - To specify where the preview pane displays in the webmail interface, select the appropriate option from the list. By default, the preview pane appears at the bottom of the content pane. Disabling the Preview Pane means only a list of messages appears in the content pane and each message will need to be opened separately in order to view their contents.
  - Disable images in preview pane - Select this option to prevent images from displaying when viewing messages in the preview pane. You may want to select this so that messages load faster. Note: By selecting this option, images will still appear when a messages is opened outside of the Preview Pane.
  - Enable reminder popup window - Selecting this option means that any reminders will display in popup windows. If your browser has a popup blocker, your email server URL may need to be

added to allow reminder popups to display. In addition, this is enabled by default.

- 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 email message is received. This notification will display no matter which section of the interface is selected and generally appears in the lower part of your screen.
- Disable reminders for appointments and tasks - Select this option to disable all reminders for appointments and tasks.
- Mark messages downloaded by POP3 as read - Select this option to mark all messages that are downloaded via a POP3 connection as read.

## Compose

Use this tab to specify settings and options for how SmarterMail behaves when composing emails from the webmail interface.

- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list. By default, SmarterMails sets the encoding to Western European (ISO). However, SmarterMail supports encoding for over 35 different text formats, thereby supporting encoding for most parts of the world.
  - Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list. SmarterMail offers dictionaries for over 17 different languages. If the user is unsure, they can select the option to use the same spell check dictionary that matches the language they selected when they logged in to SmarterMail.
  - 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, fonts or other formatting.
  - Embed as Attachment - Attaches the original message to the new message as an attachment. The message will not appear in the body of your message.
  - 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.

- **Compose Format** - This specifies the type of message that is generated in the compose window. HTML format allows for greater customization and formatting, and full use of the HTML editor, but generates larger sized messages based on the amount of formatting done to the message. Text formatted messages are generally smaller in size and remove the ability to format text, add clickable links, etc.
- **Reply Text Indicator** - This sets the character that is appended to the beginning of each line of an original message when that message is replied to.
- **Include previous replies in reply** - Select this option to embed the text of the original message in a message reply. This includes text from messages in reply threads.
- **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. Users should be careful when enabling this and only do so if required for business or compliance or regulatory requirements.
- **Enable trusted sender for webmail recipients** - Select this option to add the email addresses that you have sent mail to through webmail to your trusted senders list. This means that any email from these addresses is automatically trusted by SmarterMail and will avoid any spam filters.
- **Disable X-Originating\_IP header in messages** - Select this option to remove your IP address from the X-Originating\_IP header when sending messages via webmail. Some people prefer that their IP address isn't included in the header of emails that are sent out as they feel it is a potential security risk.
- **Warn about common email mistakes prior to sending** - Enabling this means that SmarterMail will quickly review any message sent to check for items like missing attachments. This includes times when the word "attachment" is used in the body or subject of the message, but an attachment is not being sent with the email message.
- **Automatically check spelling prior to sending** - Enabling this means SmarterMail will quickly review any message sent to check for spelling and grammar issues when sending 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.
- **Delete messages when forwarded** - 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.

Much of the information filled out in a user's Account Profile is also available as a variable that can be used when Domain Administrators create domain level signatures.

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.

Note: When changing your profile picture, while it will update automatically in the webmail interface, updated pictures won't update in any third-party chat clients like Adium or Pidgin until you actually log into the chat client and force a status change. That means that, when using the Web-based chat client in SmarterMail, users in third-party clients may not see your updated picture.

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 you receive will your auto-responder. 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 create your personalized 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.

- **Start and End Dates** - You can specify when your auto-responder will be active by setting start and end dates. This is particularly helpful for planned absences like during a vacation or extended holiday.
- **Message** - Type the text of the auto-responder in this field. You can customize the message with HTML formatting should you so desire. However, make sure that your compose format is set to HTML if you want to format your message with custom fonts, sizes, colors, links, etc. An example auto-responder is: "I will be out of the office from June 1 to June 15. I will respond to your message upon my return to the office on June 16. If you need immediate assistance, please contact Jane Doe at [jdoe@example.com](mailto:jdoe@example.com)."

## Connected Services

SmarterMail allows users to connect different services to their SmarterMail accounts to facilitate things like attaching links to shared files. The simplest example is connecting Google Drive to your mailbox so that you can share links to files stored in your Google Drive account.

To view your connected services, click the settings icon . Then expand the My Settings folder and click Connected Services in the navigation pane. A list of services that are connected to your mailbox will load in the content pane and the following options will be available in the content pane toolbar:

- **New** - Creates a new trusted sender.
- **Delete** - Permanently deletes the selected trusted sender(s).

## Connecting a Service

To connect a new service to your account, simply click the New button in the content pane toolbar. A new window will appear that lists those services currently available to users. Select the service you wish to connect, and follow the on-screen prompts offered by SmarterMail to complete the process.

## Removing a Connected Service

To remove a connected service, or to simply reset the connection, select the service from the list on the page, and click the Delete button in the content pane toolbar.

## Trusted Senders

This setting allows users to list specific email addresses (such as [jsmith@example.com](mailto:jsmith@example.com)) or domains (such as [example.com](http://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. 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. In addition, SmarterMail allows users to create HTML formatted signatures that can include stylized text, links, images, etc. For example, a signature can contain a company logo and tagline, an image that links to a personal or business social media account, or even links to other properties, like a company's help desk or management interface. Check out the SmarterTools knowledge base for more information on how to customize signatures.

To access your signature settings, 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. However, users will still be able to map signatures to any SMTP mailboxes that have been 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.

Depending on the SmarterMail Edition being used, some variables may be available for Domain Administrators to easily template out signatures for each user of a domain. Professional Edition administrators have access to a few variables that pull from a user's Account Settings whereas Enterprise Edition administrators have access to a much broader amount of information found in a user's Account Profile .

## Events Overview

The Event system in SmarterMail is an incredibly powerful tool for staying up-to-date with what is going on with the SmarterMail server.

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to 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.
- Status - Indication of whether the event is enabled or disabled. The event will only trigger if it is enabled.
- 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 Apple Mail.
- SyncML is a platform-independent information synchronization standard that syncs SmarterMail contacts, calendars, and tasks with Outlook, Thunderbird, and most smartphones.
- CalDAV is an extension of the WebDAV protocol that syncs SmarterMail calendars with Macs, iPads, iPhones, and other devices/applications that use the technology.
- CardDAV is an extension of the WebDAV protocol that syncs SmarterMail contacts with Macs, iPads, iPhones, Thunderbird and other devices/applications that use the technology.
- The Add to Outlook feature within the SmarterMail webmail interface uses two-way synchronization technology to sync SmarterMail calendars, contacts, and tasks with Outlook 2007 or higher and provides read-only capability for Outlook 2003.

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

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.
- 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.

## Remote Wipe

Remote wipe is a feature that allows users to reset a device synced using Microsoft Exchange ActiveSync back to its original factory settings, quickly and easily, right from the webmail interface. This is especially handy for devices that are lost or stolen as it can prevent personal information that is stored on the device from falling into the wrong hands. The best thing is that any information stored in SmarterMail, including any notes, tasks, emails, contacts, calendar items, etc., will still be available when a new device, or even a recovered device, is re-synced with the account.

## Filtering

### Folder Auto-clean

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

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 as well.
- Override auto-clean settings for this account - Select this checkbox to override the settings set

by your administrator so that you can create your own rules. Any changes you make will not be affected if the administrator changes their policy, unless they disable your ability to create your own rules.

## Rules

If you are using the default auto-clean settings set up by your administrator, this tab will be greyed out and you will not be able to click on it to open it. If you chose to override the settings, and if your administrator allows you to override the default settings, this tab will be active. In addition, if there are custom rules already created, a number will appear next to the Rules name on the tab showing how many rules there are. Once you open it and you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

### Auto-clean by Size

These options will be visible if you set up the rule by folder Size :

- Folder - This dropdown will show you all folders for your mail account.
- Type - This allows you to create rules based on folder Size or by Date.
- Start Auto-Clean - The size the folder needs to reach BEFORE the auto-clean rule will run.
- End Auto-Clean - The size the folder will be reduced to once the auto-clean rule finishes.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Once the rule is saved, it will display on the Rules tab as follows:

- Folder - The folder the rule was created for.
- Type - The rule type, either Size or Date.
- Settings - A description of the rule. For example, if you set a Size rule to start when a folder is 10MB and to reduce the folder to 5MB, the Settings will show as "Over 10MB, reduce to 5MB"

### Auto-clean by Date

These options will be visible if you set up the rule by Date :

- Folder - This dropdown will show you all folders for your mail account.
- Type - This allows you to create rules based on folder Size or by Date.
- Mail Age - This allows you have mail that is over a certain number of days old automatically deleted from the folder.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Once the rule is saved, it will display on the Rules tab as follows:

- Folder - The folder the rule was created for.
- Type - The rule type, either Size or Date.
- Settings - A description of the rule. For example, if you set a Date rule to run on mail that is over 120 days old, the Settings will show as "Over 120 days old"

## Content Filtering

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

To access your content filtering settings, click the settings icon . Then expand the My Settings and Filtering folders and click Content Filtering in the navigation pane. Note: If you have blocked any senders in your Inbox, there may be a content rule that was automatically created as a result of that action.

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 appear in the list . Therefore, when a content filter gets triggered and performs an action on a message, 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 the wizard will walk you through each step necessary to create the filter. You can go back and forward within the wizard, and a rule will only be created when you actually Save it.

### 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 uses the "And" modifier, meaning it requires one criterion to be met from each and every section, or the "Or" modifier, meaning just one of the criteria in any section needs 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.

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

- Mark as read - Automatically marks the messages a read, which means it will not show up in your inbox, or any other folder, as unread.
- Mark as follow-up - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.
- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: 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 - 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 - Will append a prefix to the subject line of the email. This is useful for categorizing emails as the subject line will be altered to include the text you specify in the Comment box.
- Add Header - Includes an email header into the message, which can be useful when performing additional filtering through Outlook or another email clients. 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.

Unlike "Copy message", this option will not store a copy of the email in your own account.

- Set Priority - Will automatically elevate the priority of a message. For example, if you create a content filter that flags a message from a VIP, you may want to set the priority of the message to High as well to denote its importance.

Once the content filter is created, click Save to actually make the filter active. You can move back and forth throughout the wizard as well in order to check, and double check, your settings.

## Content Filter Types

### From Address

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

### Contains Specific Words or Phrases

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

### To Address

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

### Attachments



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

#### Other

- 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. In most cases, your system administrator, or even your domain administrator, already has some basic spam filtering options set up. However, you can certainly modify those settings to further filter out potentially unwanted email.

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

- Contacts
- Calendars
- Tasks
- Notes
- Email folders

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).

When a Shared Resource is set up, they are listed on the Shared Resources page. Each resource is listed by name, by type (e.g., Notes) and by the number of shares/permissions that were set up for the resource.

### Adding a Shared Resource

Adding a Shared Resource is quite easy. Simply follow the steps below:

- Click on the New button
- You're presented with the options available to be shared. Select the resource you want to make available to others.
- Click Next
- You have the ability to share items with individuals or groups. You can select multiple individuals by holding down the Ctrl button (in Windows) or the Command button (in OSX).
- You can also set the permissions level on the Users or Groups you share items with. These permissions include the following. Note: Permission options are dependent upon the resource you are sharing.
  - None
  - Availability-only: For calendar resources, this allows users to only see the availability of others when setting up Events.
  - Read only: Allows users to only see the shared data but not have any ability to edit it.
  - Full control: Allows users to fully edit the shared resource.
- Click the Save button. Your Shared Resource now shows on the Shared Resources page.

## Individual Permissions on Shared Resources

If you create a shared resource and then share that resource with a number of individuals -- say, the members of a team -- you can set special permissions for each user you share the resource with. For example, you have a group of people working on a specific task, you can give a team lead full control over the task and give the rest of the team read only permissions. This allows the entire team to share the task and any notes, changes, etc. made to it but it limits editability to only the team lead.

## Mapped Resources

This feature is only available in SmarterMail Enterprise.

When you share a resource with someone else, it's called a Shared Resource . When someone shares a resource with you, SmarterMail considers that a Mapped Resource. Note: Conference Room resources shared with Everyone on a domain will not appear on an individual's Mapped Resources page. They only appear when creating a new event in the webmail interface. In general, the following can be shared with you by any individual:

- 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.

## Attaching to Mapped Resources

When you go to your Mapped Resources page you will see a list of items others are sharing with you and the status of the share. Any item marked "Detached" will need to be attached to you before you can access it. In general, each item is listed by the Username of the person sharing the resource with you, the resource type, the name of the resource, the Friendly Name, the permission level granted to you and the status. To attach a resource, do the following:

- Select the resource you want to attach to your account by checking the box next it.
- Once selected, click the Attach button.
- Once the item is attached, you'll see a screen listing the details of the resource. If you like, you can edit the Friendly Name of the resource to something more descriptive or to anything of your choosing. Note: This does not change the name of the resource for anyone but yourself.
- Click the Save button to finalize attaching the resource.

If you no longer need access to a shared resource, simply check the box next to the item and click the Detach button. Note: This does not delete the resource from your list. The resource will still show up in your list of Mapped Resources until the original user deletes it.

## Advanced Settings

### Auto-complete

Because most users generally send email to the same people or addresses, SmarterMail automatically pulls email addresses from your Sent Items folder, your contacts, the Global Address List (GAL), aliases and mailing lists and saves the all separately to an auto-complete list. This list is different than

your Contacts list as it covers accounts you may not have actual contacts set up for. 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.

## Editing the Auto-complete List

When you bring up the auto-complete list, you will see all of the addresses saved listed by Email Address, Display Name and Source. The source listed will be either one of the following:

- Sent items
- Contacts
- Global Address List
- Alias
- Contacts

You can only delete addresses that were pulled from your Sent Items folder. To do this, simply select the addresses and click Delete in the content pane toolbar. To delete other items you will need to do so from their respective locations within SmarterMail. That is, from your contacts, by deleting aliases, etc.

## Calendar Settings

SmarterMail gives you several customized settings for how you want your calendars to appear. This includes the default calendar you want to view, the default timeframe to display, the location you want to use for displaying weather forecasts and more.

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.
- Default Calendar - If you have any Shared Calendars , you can select that as the default calendar you use. By default, this is set to My Calendar, or your personal calendar.
- Calendar Auto Clean - SmarterMail allows you to keep past calendar events from cluttering up your calendar views. Generally domain administrators will set this option for all users of the

domain. However, if you have the ability to set your own auto-clean parameters, you can do so with this setting.

- Enable display of weekends in the weekly view - Select this option to set the weekly calendar view to include the weekends. As some people only use their calendars for the "business week," disabling weekends can further keep the calendar clean and organized.
- Enable display of weekends in the monthly view - Select this option to set the weekly calendar view to include the weekends.

## Tasks

When a task is created, it will generally have start and end dates and times associated with it.

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

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 in their area, or any area they choose, 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 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

These days it's rare for someone to have, and use, a single email address. That's why SmarterMail's Message Retrieval feature is so great: it allows users to access email from another account simply using the SmarterMail Web interface. That means users can add their Gmail, Hotmail, Yahoo! or any other mail account to SmarterMail so that they can receive all of their emails, from a number of different accounts, from within a single interface. A nice complement to Message Retrieval is SMTP Accounts , which allows users to send email from additional accounts as well. 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.

**Adding a New Account Adding an account to message retrieval is quite simple. You will, however, need to fill in several pieces of information in order for SmarterMail to actually connect to the account and start retrieving messages. If you do not know any of these settings, it's a good idea to contact your IT or Email Administrator with the list, below, that corresponds to the type of connection you want to make with the account, either POP or IMAP.**

### **POP Retrieval**

SmarterMail's POP retrieval service will download email messages from another server via POP3 and deliver them to your SmarterMail mailbox. The primary difference between POP and IMAP is that a POP account will generally retrieve messages from the server, then delete them from the originating server. While SmarterMail's Message Retrieval feature DOES allow you to leave messages on the server, users need to make sure they enable it. Otherwise, POP retrieval will delete the messages. When creating a new account for POP message retrieval, the following options are available:

- Type - Select either POP or IMAP.
- Server Address - The address for the email server for which you want to connect. This will most likely be the URL to the mail server. (E.g., mail.example.com).
- Port - The port used to connect to the email server. By default, the port is 110. However, some mail providers may require a separate port be used for POP retrieval.
- Username - The identifier used to authenticate with the email server. This will most likely be the full email address you want to bring into SmarterMail.
- Password - The password used to log into the mail account.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server, either Manual or Automatic. If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve to check for new messages. Automatic retrieval can be modified by the system administrator, but is set to 10 minutes by default. Automatic retrieval does not require you to return to the Message Retrieval page.
- Destination Folder - The folder you want to use for messages that are downloaded from the server.
- 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 while leaving the original messages on the original mail server. When creating a new account for IMAP message retrieval, the following options are available:

- Type - Select either POP or IMAP.
- Server Address - The address for the email server you want to connect to. This will most likely be the URL to the mail server. (E.g., mail.example.com).
- Port - The port used to connect to the email server. By default, the port is 143. However, some mail providers may require a separate port be used for IMAP retrieval.
- Username - The identifier used to authenticate with the email server. This will most likely be the full email address you want to bring into SmarterMail.
- Password - The password used to log into the mail account.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server, either Manual or Automatic. If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve to check for new messages. Automatic retrieval can be modified by the system administrator, but is set to 10 minutes by default. Automatic retrieval does not require you to return to the Message Retrieval page.
- Folder Transfer Method - The method by which SmarterMail imports any email folders from the server. Unlike a POP connection, IMAP allows existing folders to be brought into SmarterMail. This is a benefit of using IMAP as your connection type.
- Requires SSL - Select this option if the connection to the server must be SSL.

## **Notification Profiles**

Users of SmarterMail can create Events that allow them to select criteria and apply specific actions when the criteria are met. One of the actions is to receive email notifications when an event is triggered. 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 friendly 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. Alternatively, you can select the profile and click on the Edit button. Regardless of how you open the profile, it will load as a modal window in the content pane.

## Creating a Notification Profile

Creating a notification profile is very simple. Just click on the New button, and a new modal window will open with the following options:

- **Notification Profile Name** - The name you set for the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent. More than one email address can be added to this field, they just need to be separated with a comma.
- **Enable** - Checking this box will enable email notifications.
- **SMS Email Address(es)** - Sometimes users will want notifications sent to their mobile devices via text message. Here you'll input the mobile device email address to which notifications are sent. If you're unsure of this address, contact your mobile provider.
- **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.

## Use of Notification Profiles

As mentioned, notification profiles are primarily used in conjunction with Events. When a new event is created, users have the ability to select a notification profile to use when that event fires. If more than one notification profile is available, each will be listed and users will need to make sure they've selected the proper profile to use with that event.

## SMTP Accounts

Setting up an SMTP Account allows you to send email from a third-party mail server account right from within SmarterMail. Generally, you would also want to set up the corresponding Message

Retrieval information. For example, imagine you have SmarterMail, Gmail, and Yahoo! email addresses. To view, reply and send out new messages from the Gmail and Yahoo accounts through SmarterMail's web interface you could do the following:

- Add a Message Retrieval item for the Yahoo and Gmail accounts to POP all messages to a Yahoo and Gmail folder within SmarterMail. Set the Retrieval Method to Automatic.
- Add an SMTP Account specifying the information needed to send messages through the Yahoo and Gmail SMTP servers. Using these two features in conjunction means you have a single webmail interface to use for virtually any email account you have across the Internet. As most people have, and use, more than one email address, being able to combine all accounts into one interface means you have access to all of your email in a single spot.

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

## 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:

#### Logout URL

By default, when users log out of SmarterMail, they're taken back to the standard log in screen. However, if the system administrator allows it, domain administrators can set a special page to load when users log out of webmail. This page be any page the domain administrator desires. For example, perhaps company management wants users redirected to an Intranet page, or some other company-specific page, to appear when users log out. The domain administrator simply clicks the Override System Settings check box and adds in the specific URL in the Logout URL text box, then checks the Enabled box. Now, once a user logs out they are redirected to that page in their browser.

#### 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

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

Use this 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 is automatically removed from the mailing list. For example, if someone mis-types their email address, it is not efficient to continue attempting to send an email to that address. By default, the threshold is set to 5.
- Enable - Select this option to enable the deletion bounce threshold. By default, this setting is enabled.

## Global Address List

The Global Address List (GAL) is basically a listing of all users who have accounts for your particular email domain. A GAL is extremely important for companies that have a number of employees as it is a central repository for information about everyone. In addition, it integrates with SmarterMail's Contacts feature and provides a listing of email addresses that users can then use for creating Events, emailing co-workers, sharing calendars and contacts, and much more. From a domain administrator's perspective, the following options are available:

- Enable mailing lists in the Global Address List - Checking this box means that any list that is created will appear as a contact in the Global Address List. In turn, that means anyone with access to the GAL will be able to see and/or possibly send emails to the list.
- Enable aliases in the Global Address List - Checking this box means that any aliases that are created will also appear in the GAL. By default this is checked, but domain administrators may want to exclude aliases from appearing in the GAL as they could be used to send emails to customers or to important contacts, or for a number of other reasons.

## Users

This settings page is only available to domain administrators.

An email user account represents a person's actual mailbox and email address. For example, jdoe@example.com. User accounts can receive email, send email, and login to the Webmail interface in addition to using the other features of SmarterMail. This includes things like calendaring, creating and sharing contacts, creating and managing tasks using SmarterMail's live chat and much more.

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.

Adding a new user and editing an existing user are essentially the same process, and they both deal with the same settings. To create a new user, simply click on the New button in the content pane toolbar. To edit a user's settings, select the desired user and click Edit in the content pane toolbar. You can also double-click on a user to open their settings. Regardless of the method used, 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. This is the portion of the email address that comes before the domain name. For example, the "jdoe" part of jdoe@example.com.
- Authentication Mode - The authentication method used to login to SmarterMail. By default, SmarterMail will use its included username/password authentication. However, SmarterMail can also be integrated with customers using Microsoft Windows Active Directory for their corporate logins. For information on Active Directory integration, visit the SmarterTools Knowledge Base .
- Domain - The Domain to authenticate against when Active Directory is used for the Authentication Mode. This feature is not displayed if SmarterMail is used as the Authentication Mode .
- Password - The password for the user to login to Smartermail. This feature is not displayed if Active Directory is used as the Authentication Mode.
- Display Name - The friendly name that is 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 to use for marking the sending and receiving date and time.
- Backup Email Address - This is a backup email address that can be used for password recovery information should a user forget their mailbox credentials.
- User Status - Domain administrators can change the status on a mailbox to limit a user's access as needed. For example, if a user leaves the company, either voluntarily or not, a domain administrator can suspend the account pending further review by company management. Options include:
  - Enabled - The mailbox is in use by the user.
  - Disabled and allow mail - The mailbox continues to receive email but the user is unable to access their mailbox.
  - Disabled and don't allow mail - The mailbox no longer accepts incoming messages and the

user is unable to access their mailbox.

- Mailbox Size Limit - The maximum size of the mailbox. By default, the maximum mailbox size is 100 MBs. However, domain administrators can change this to whatever they like to correspond to company limits. For unlimited disk space, type in 0.
- Calendar auto-clean - SmarterMail allows domain administrators to keep users' past calendar events from cluttering up calendar views. By default, this is set to Domain Default which is set in the Default User Settings .
- Disable password changes - Select this option to prevent the user from changing the login password.
- Enable domain administrator access - Select this option to allow the user to edit domain settings.
- Show in Global Address List - Select this option to add the user to the Global Address List. Use this option on accounts that are tied to real people as opposed to addresses used by departments, such as support@example.com.
- Enable POP retrieval - Select this option to allow users to download email via POP from other email accounts. For example, if a user has a second email address that they monitor, enabling this option allows the user to set up POP Message Retrieval for that address and download email sent to that address into their SmarterTools mailbox. NOTE: POP retrieval will take the mail from the original mail server and download it into SmarterMail, thereby deleting the message from the original mailbox.
- Enable IMAP retrieval - Select this option to allow users to download email via IMAP from other email accounts. For example, if a user has a second email address that they monitor, enabling this option allows the user to set up IMAP Message Retrieval for that address and download email sent to that address into their SmarterTools mailbox. NOTE: IMAP retrieval will take the mail from the original mail server and download it into SmarterMail, but it leaves a copy of the message in the original mailbox.
- Disable greylisting - Greylisting is an anti-spam measure that rejects the initial incoming message from an unrecognized email address and waits for the sending mail server to attempt to resend the message before it's allowed to be delivered. While effective, this can also lead to a delay in message receipt. Domain administrators can disable greylisting on a user-by-user basis as needed, while allowing it for other mailboxes.
- Enable outgoing mail signing - Selecting this option means outgoing messages will be signed via DKIM and/or DomainKeys.

## Webmail

Use this tab to specify the following Webmail settings:

- Initial Page on Login - The page users will see upon logging in to SmarterMail. Users can either go directly to their Inbox or go to the My Today Page.
- Display Format - To specify the default format used for displaying messages, select the appropriate option from the list.
  - HTML - This option will display messages and their HTML content, if present in the email. This content can include stylistic elements such as special fonts or colors, as well as hyperlinks, images and other formatting elements.
  - Text - This option will only display text, without any special formatting. 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 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 - To specify the default skin to use for all mailboxes, select the appropriate option from the list. The Default skin is the standard blue skin that SmarterTools includes with all products.
  - Preview Pane - To specify where the preview pane displays in the webmail interface for users, select the appropriate option from the list. By default, the preview pane appears at the bottom of the content pane. Disabling the Preview Pane means only a list of messages appears in the content pane and each message will need to be opened separately in order to view their contents.
- Disable image in preview pane - Select this option to prevent images from appearing when users view messages in the preview pane. You may want to select this to enable messages to load faster. Note: By selecting this option, images will still appear when a messages is opened outside of the Preview Pane.
- Enable reminder popups - Selecting this option means that any reminders will display in popup windows. If a user's browser has a popup blocker, the email server URL may need to be added



to allow reminder popups to display. This is enabled by default.

- 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 email message is received. This notification will display no matter which section of the interface is selected and generally appears in the lower part of your screen.
- Disable reminders for appointments and tasks - Select this option to disable all reminders for appointments and tasks for users.

## Compose

Use this tab to specify the following settings for the Compose window that opens when a users begin writing emails:

- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list. By default, SmarterMails sets the encoding to Western European (ISO). However, SmarterMail supports encoding for over 35 different text formats, thereby supporting message encoding for most parts of the world.
- Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list. SmarterMail offers dictionaries for over 17 different languages. If the user is unsure, they can select the option to use the same spell check dictionary that matches the language they selected when they logged in to SmarterMail.
- 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, fonts or other formatting.
- Embed as Attachment - Attaches the original message to the new message as an attachment. The message will not appear in the body of your message.
- Auto Save Frequency - To specify how frequently SmarterMail saves a draft of a message a user is writing, select the appropriate option from the list. The default setting is 2 minutes.
- 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 - This sets the character that is appended to the beginning of each line of an original message when that message is replied to.

- Include previous replies in reply - Select this option to embed the text of the original message in a message reply. This includes text from messages in reply threads.
- 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. Domain administrators should be careful when enabling this and only do so if required for business or compliance or regulatory requirements.
- Enable trusted sender for webmail recipients - Select this option to add the email addresses that users send mail to through webmail to their trusted senders list. This means that any email from these addresses is automatically trusted by SmarterMail and will avoid any spam filters.
- Disable X-Originating\_IP header in messages - Select this option to remove the user's IP address from the X-Originating\_IP header when sending messages via webmail. Some people prefer that their IP address isn't included in the header of emails that are sent out as they feel it is a potential security risk.
- Warn about common email mistakes prior to sending - Enabling this means that SmarterMail will quickly review any message sent to check for items like missing attachments. This includes times when the word "attachment" is used in the body or subject of the message, but an attachment is not being sent with the email message.
- Automatically check spelling prior to sending - Enabling this means SmarterMail will quickly review any message sent to check for spelling and grammar issues when sending via webmail.

**Forwarding Use this tab to set up SmarterMail to forward received messages to another email account. This is a way to send copies of emails to an outside entity, or to a separate email address the user prefers to check.**

- Forwarding Address - The email address to which messages will be forwarded.
- Delete messages when forwarded - Select this option to automatically delete messages from the user's SmarterMail inbox after those messages are forwarded.

## Groups

This feature is only available in SmarterMail Enterprise edition.

User 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. Domain administrators can use this to ensure users don't send out massive amounts of email through out the day, thereby possibly getting the domain blacklisted. 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.
- **Outgoing Bandwidth per Hour** - The total number of MBs sent by the user per hour. By default, the outgoing bandwidth is 100MB.
- **Throttling Action** - When using either message or bandwidth throttling, administrators can select an action for SmarterMail to take once the particular throttling level is reached. Of course, administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of mail being sent falls beneath the throttling limit that is set.

## Plus Addressing

Plus addressing is a feature of SmarterMail that allows the user to automatically filter 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. Limiting services such as POP, IMAP and SMTP access means that users are not able to connect their email accounts to external email clients, etc.

- 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.
- Enable XMPP access - Select this option to allow users to set up third-party chat clients like Adium, Pidgin and Windows Live Messenger for use with SmarterMail's live chat features.

## Email Aliases

This settings page is only available to domain administrators.

An email alias is essentially a forwarding email address that can be used to forward messages to a single address or multiple email addresses. Aliases are most commonly used for departments or groups of individuals, like a small team of people working on a project or task.

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

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 existing aliases will appear in the content pane.

To create a new email alias, click New in the content pane toolbar. To edit an existing email alias, select it and then click Edit in the content pane toolbar. Whether creating a new alias or editing an existing one, the settings for these will appear in a modal pop-up 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`.

- **Email Address (One per line)** - Type the full email address(es) of the users who should receive the messages sent to this alias.
- **Disable greylisting** - Select this option to disable greylisting for the email alias. In general, greylisting can be disabled for aliases that are used only for internal email. That is, mail that is sent within an organization and not from the general public.
- **Enable in Live Chat (XMPP)** - Select this to allow the alias to appear as a contact in live chat. Enabling aliases for live chat means that instant messages can be sent to the alias from within webmail as all as when using third-party chat clients.
- **Show in Global Address List** - Select this to display the alias in the Global Address List.

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.

## A Note About Catch-All Aliases

A catch-all alias is simply that: an alias that catches all email sent to a domain that doesn't correspond to an actual account. Catch-all aliases can be useful as long as they are monitored and kept clear of unwanted email. However, due to the nature of email and the amount of spam that is sent every day, a catch-all can become a burden to email systems and to domain administrators. Therefore, it is suggested that they be used sparingly, or not at all if it can be avoided.

## 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.
- **User 1** - The username or email address of the person who originated the chat.
- **User 2** - 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 for all users of the domain. 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).

To add a trusted sender to the list, simply click the New button and add each address or domain in the modal window. Each separate entry should appear on a new line in the text box.

## 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 Add 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.

Whether you add or edit a signature, the signature creation window appears. Here, you can create signatures using a full HTML editor that allows domain administrators to add in stylized text, links to websites, images and even icons linked to social media outlets. In addition, the signature can incorporate variables so that a generic template can be created for all users of the domain. The available variables are listed by clicking the Variables dropdown in the text box's toolbar.

## Notification Profiles

This settings page is only available to domain administrators.

SmarterMail users can create Events that allow them to select criteria and apply specific actions when the criteria are met. One of the actions is to receive email notifications when an event is triggered. 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 friendly 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. Alternatively, you can select the profile and click on the Edit button. Regardless of how you open the profile, it will load as a modal window in the content pane.

## Creating a Notification Profile

Creating a notification profile is very simple. Just click on the New button, and a new modal window will open with the following options:

- Notification Profile Name - The name you set for the profile.
- Email Address(es) - The email address(es) to which notifications are sent. More than one email address can be added to this field, they just need to be separated with a comma.
- Enabled - Checking this box will enable email notifications.
- SMS Email Address(es) - Sometimes domain administrators will want notifications sent to their mobile devices via text message. Here you'll input the mobile device email address to which notifications are sent.
- Enabled - Checking this box will enable SMS notifications.
- Enable reminders for all domain administrators - Checking this box will display reminders for tasks and appointments in a popup window in webmail.

## Use of Notification Profiles

As mentioned, notification profiles are primarily used in conjunction with Events. When a new event is created, users have the ability to select a notification profile to use when that event fires. If more than one notification profile is available, each will be listed and users will need to make sure they've selected the proper profile to use with that event.

## Domain Shared Resources

This settings page is only available to domain administrators.
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SmarterMail allows domain administrators to create shared resources for all users of a specific domain. For example, calendars that can be used for tracking a department's vacation schedule or company holidays. In addition, this is where domain administrators set up calendar items that are used for shared conference room scheduling.

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 friendly 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. The number displayed will correspond to the number of permissions added. Therefore, if the resource is shared with a group (alias), then only 1 will display, but if a resource is shared with multiple individuals, the total number of individuals will be displayed.

## 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 room designation. For example, South Conference Room or Main Hall.
- **Type** - The type of resource being added. For now, only **Calendar** is available.
- **Resource is a conference room** - Select this checkbox to designate the resource as a conference room.

## Other Options

Apart from creating a new shared resource, domain administrators have the ability to do the following:

- **Edit** - Editing a resource allows admins to change the permissions assigned to the resource. For example, adding or removing users, groups, etc.
- **Delete** - Deletes the resource and any associated permissions. A deleted resource simply reverts to "None" in any associated appointments.
- **Rename** - Simply changes the name of the resource in the appointment dropdown and on any associated appointments.

## Adding a Conference Room

When you add a shared resource as a conference room anyone with permissions to access the conference room will be able to add it to any event that they create. SmarterMail will check for availability and, if any conflicts are found, they will be displayed in the event creation window. Event coordinators will then have to select a new day and/or time in order to clear up the conflict. **NOTE:** Unlike actual shared calendars, shared conference rooms will **NOT** show up as an available shared calendar for users outside of creating new events.

## Filtering

### Domain Folder Auto-clean

This settings page is only available to domain administrators.

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

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. 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. Domain administrators can further modify these settings as well as set up rules for Content Filtering and Domain Auto-cleaning .

To view the spam filtering settings for your domain, click the settings icon . First expand Domain Settings, then expand the Filtering section 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.

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

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

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.

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. Users can either subscribe to the mailing list and receive each email sent to the list or to the digest, in which case they receive a summary of all messages sent to the list over a specific period of time. Users can not subscribe to both.

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.

## 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** - Essentially, the "username" for the mailing list. SmarterMail will use the name to create the actual email address that will be associated with the mailing list.
- **Moderator** - The "owner" of the mailing list. This person will actively manage the mailing list, posts to the list and any replies. The moderator must be an active email user for the domain.
- **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 add the password to the subject line of the email, enclosed by brackets and colons. For example, [:password:]  
Attention all subscribers.
- **Enabled** - Check this box to enable password protection 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 anyone can email the list, regardless of whether they are subscribed to the list or not. In turn, this sends an email to all members. Note: This setting can cause abuse if it is not closely monitored. Therefore, it is recommended to restrict the allowed posters to 'subscribers only', at the very least. For larger lists, allowing Moderator Only is a better idea and will cause less issues.
- **Subscribers Only** - 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. This can cause abuse issues as well if you have an active list, so using Subscribers Only should only be used for smaller lists or for digest mode only.
- **Moderators Only** - If the moderator is set as the post option, the moderator is the only one who can post to the list. This means that no one else, not even list subscribers, will be able to post.
- **Subject Prefix** - The optional text that will appear in the subject line. SmarterTools recommends using a subject prefix for discussion lists to help subscribers easily filter through posts. For example, add a "List- " or "Discussion -" prefix so that users know that the message is posted to an email list. Recipients can then create filters to move those messages to a specific folder or manage them in some other way.
- **Enabled** - Check this box to enable the subject prefix for this mailing list.
- **List To Address** - The email address that will display in the To field when a subscriber receives a mailing list message. Setting this to List Address means that the email address associated with the list will display as the To: address when recipients receive the message.
- **List From Address** - The email address that will display in the From field when a subscriber

receives a mailing list message. By default this is set to List Address.

- List Reply To Address - The email address that will display in the Reply To field when a subscriber receives a mailing list message. When a subscriber hits 'Reply' to the message, this address will receive the reply. If a subscriber hits 'Reply All' all list recipients will receive the reply. By default this is set to List Address
- 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 options:

- Enable Digest Mode - Digest mode is a way to aggregate all postings to a list so that subscribers can receive a single, periodical email instead of individual replies to the list. This is especially useful for very active lists or lists with a larger number of subscribers. 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 confirming their subscription to the list. Note: This is not an opt-in message, only a confirmation email.
- Send Unsubscribe Email - Select this option to automatically send an email response to unsubscribe requests.
- Enable 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 to new subscribers that requires them to confirm that they are subscribing to the list by clicking on an activation link. Using double opt-in is a good way to confirm subscriptions to the list and to help reduce abuse complaints.
- **Disable List Error Replies** - Select this option to prevent the system from automatically replying to incorrect listserv commands.

## 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. 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 digets 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.
- **failedtosetstandardmode** - 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 o, messages that are sent to list subscribers.
- **header** - This is the header (informatin 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 partiular list. This requires the LIST command to be set.
- **listofflists** - LISTSERV COMMAND ONLY. This reutrns a list of the mailing lists for a particular domain. This requires the LIST command to be set.

- maxmessageizeexceedemail - 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.

## 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. If an email address has a large number of bounces, that could be an indication that the subscriber is no longer active and that the email address should be removed from the list of subscribers.

The following actions are available from the content pane toolbar:

- New - Allows you to add a new subscriber.
- Edit - Allows you to edit subscriber details.
- Delete - Allows you to delete a subscriber.
- Search - Allows you to search for a specific subscriber by email address or by any defined subscriber fields.
- Upload - Allows you to upload a list of subscribers to the mailing list. Note: Only CSV files

can be uploaded.

- Download - Allows you 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 basically an alternate domain name for one that already exists in SmarterMail. For example, if the domain 'example.com' is in SmarterMail and has the user 'user@example.com' added to it, by adding a domain alias for 'example.net', emails sent to 'user@example.net' will be delivered to 'user@example.com'. That means that emails sent to either domain will end up in the same mailbox.

There are a few reasons why a domain alias is used. One is for branding purposes. If you have multiple extensions for an existing domain, using a domain alias for each extension means that you won't miss any emails if people send to one of your other domains. It is important to note that you must own each domain you're using in order to create domain aliases. In addition, 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.

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

In order for domain administrators to add new SmarterMail users via the LDAP protocol they simply need to type the LDAP binding string in the LDAP Binding String 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).

## Creating a User Group

To create a user group, simply click the New button, and a modal window will pop up with the following options:

- Name - The friendly name of the user group.
- Username - The individual users you want to add to the user group. To select multiple users, simply hold down the CTRL key (for Windows) or the Command key (for OSX) and click on each user to add. Note: Only actual users are available for addition to user groups. Alisases are not.

## Default User Settings

This settings page is only available to domain administrators.

For domains that have a large number of users, it can be time consuming to have to make a change to user permissions and then make sure each user has the same change applied to their mailbox. Additionally, if changes need to be made to a select few users, that can be difficult as well.

With Default User Settings, domain administrators can create a template for their users so that they only have to make the change in one location, and then Propagate User Settings to each user on the domain, or to a select few users. This makes changing settings quick and easy and ensures each user has the exact same permissions and settings applied. In addition, making a change to Default User Settings doesn't automatically propagate, so a change to default settings does not change users that are already in place for the domain.

The default user settings are identical to those found when adding a single user. For more information on these settings, refer to the help page that outlines setting up new Users .

## User Propagation

This settings page is only available to domain administrators.

Use this section to apply global Default User 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 so that you can select which settings you want propagated to each user. 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 .