My Settings

Help Documentation

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 work "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 adminstrator 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 acount 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 particulary 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."

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) or domains (such as example.com) that will be exempted from spam filtering. This can prevent mail from friends, business associates and mailing lists from being blocked and lets the system know that these messages come from a trusted source. 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 sycned 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 automaticly 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 nex 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 dislpy 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 dislpy 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 priorty 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 antispam 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.

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 exapnd the My Settings and Advanced Settings Folder and click Caledar 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 futher keep the calendard 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 filed 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 Retrival 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 a 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 cotent 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 availble, 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.