



# Advanced Settings

Help Documentation

## 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 timeframe to display, the location you want to use for displaying weather forecasts, the calendar auto clean rules, how many calendars to configure and more.

To view your calendar settings, click the Settings icon . Then expand the My 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.
- **Calendar Auto Clean** - SmarterMail allows you to keep past calendar events from cluttering up your calendar views. Generally domain administrators will set this option for all users of the domain. However, if you have the ability to set your own auto-clean parameters, you can do so with this setting.
- **Display weekends 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.
- **Display weekends in the monthly view** - Select this option to set the monthly 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.
- **Display task start times in the calendar view** - Select this option to view the date and time a task is scheduled to start on the calendar.
- **Display task due times in the calendar view** - Select this option to view the date and time a task is scheduled to be completed on the calendar.
- **Hide completed tasks** - Select this option to remove completed tasks from the calendar view.
- **Add invites as tentative appointments** - Select this option to utilize tentative calendar appointments. When a meeting invitation is sent, a tentative appointment will be automatically added to the calendar. The appointment can then either be accepted or declined from the email request or directly within the calendar interface. If a meeting or event is tentative, the reminder will still be sent if one was added to the invite. Note: This setting is enabled by default.
- **Zip Code** - 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, enter your postal code in the field and select the Enable weather checkbox. Weather forecasts are provided by the National Weather Service.

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.

## 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.

## Calendars

Use this tab to modify the resources that can be displayed in your calendar. Users can add multiple personal calendars and adjust the color and name associated with each resource. By default, a user's personal calendar and tasks will be listed, as well as any domain resources, such as calendars or conference rooms.

In general, the following columns will be available:

- **Checkbox** - Use these boxes to select multiple resources.
- **Display Name** - The friendly name of the resource.
- **Type** - The type of resource shown: Calendar, Task or Room.
- **Owner** - This column specifies who the resource belongs to. Shared resources will display the username of whoever shared the resources, while domain shared resources display the domain name.
- **Access** - The level of access you have for the resource: Availability-Only, Read-Only or Full Control.
- **Color** - The color of the resource.

To add a new personal calendar, click **Add** in the content pane toolbar. To edit an existing resource, click **Edit** . The following options will be available:

- **Resource Type** - The type of resource: Calendar, Task or Room.
- **Display Name** - The friendly name of the resource.
- **Color** - The color of the resource. Enter the hex color code or choose an option from the color picker.
- **Default** - Select this checkbox to choose the default calendar selected for new appointments.

## 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 appear 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.