



# Help for Users & Domain Administrators

Help Documentation

## **Help for Users & Domain Administrators**

### **Logging in to SmarterMail's Webmail Interface**

SmarterMail users can access SmarterMail through a webmail interface in addition to connecting their mailbox to an email client such as Microsoft Outlook for Windows or Mac, MacMail or even using the email clients on most mobile devices. The major advantage of using the webmail interface, however, is that users can login to their SmarterMail mailbox from any computer with an Internet access, anywhere in the world.

To log in to the SmarterMail Web interface, users will need to obtain the appropriate link from their domain administrator or system administrator. Generally, this will take the form of a standard email URL such as <http://mail.example.com>. To login to SmarterMail, simply type your full email address and password in the appropriate fields and click Login .

To stay logged in to SmarterMail even after closing the browser, be sure to select the Remember Me checkbox. This will allow SmarterMail to encrypt the email address and password. Note: Browser cookies must be enabled for this feature to work. In addition, SmarterTools does not recommend selecting this option if you use a public or shared computer.

After clicking the log in button, you will be logged into your SmarterMail mailbox and, depending on your settings, the My Today Page or your inbox will display in the content pane. If you have trouble logging in or experience issues with your email account, contact your domain administrator for troubleshooting help. The domain administrator is usually the owner of the domain or the person who set up your email account.

### **Logging in with a Smartphone**

SmarterMail also provides a mobile interface that was designed specifically for smartphones and other mobile devices with smaller screens (4 inches or less). This is a light, yet fully functional interface that allows SmarterMail users to access their email, contacts, calendars, tasks and notes regardless of their location and connection speed. This mobile interface is accessible either from the link provided on the main SmarterMail webmail interface login page or by appending "/mobile" to the end of the SmarterMail login URL that is provided by a domain or system administrator.

## **Synchronizing with SmarterMail**

### **Overview**

SmarterMail is a powerful collaboration mail server that supports the synchronization of calendars,

tasks, notes, and contacts on desktop applications like Microsoft Outlook and over-the-air synchronization for most popular mobile devices.

It should be noted that synchronization capabilities may vary depending on the edition of SmarterMail that you are using:

- For full synchronization capabilities, SmarterTools recommends upgrading to SmarterMail Enterprise. SmarterMail Enterprise users have the ability to synchronize their mailboxes using any of the protocols discussed in this document.
- SmarterMail Professional users can download their email using IMAP or POP3 retrieval, but they cannot sync calendars, contacts, tasks or notes.
- SmarterMail Free users have the ability to synchronize their mailboxes using any of the protocols discussed in this document except Microsoft Exchange ActiveSync and Exchange Web Services, which are only available as add-ons to SmarterMail Enterprise.
- NOTE: Regarding Windows 8 and Windows Server 2012, only the most current version of SmarterMail was tested and validated for these operating systems. Previous versions may work as well but they may also require you to work around known issues. See the SmarterTools knowledge base for more information.

This document covers the synchronization methods and processes for the following applications and devices:

- Apple OS X
  - Apple Address Book
  - Apple iCal
  - Apple Mail
- Microsoft Windows 8
  - Windows 8 Mail
  - Windows 8 People
  - Windows 8 Calendar
- Cross Platform Options
  - Microsoft Outlook
  - Mozilla Thunderbird
- Mobile Devices
  - Apple iOS
  - BlackBerry
  - Google Android

- Symbian
- Windows Phone

Note: This is not an exhaustive list of all compatible applications and mobile devices. SmarterTools recommends contacting the manufacturer for details regarding the available synchronization protocols for applications and/or mobile devices not listed in this document.

## Who Should Use This Document

This document is intended to be used in conjunction with the SmarterMail Online Help, Knowledge Base articles (KBs), and other SmarterTools reference sources as part of an overall solution. It should be used by:

- Hosting companies, Internet Service Providers (ISPs) and IT professionals as part of a complete SmarterMail communications solution for their customers
- Individual users of SmarterMail seeking to maximize the functionality and features of the SmarterMail account

## Synchronization Protocols

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

- Microsoft Exchange ActiveSync is an optional add-on that syncs SmarterMail mailboxes, calendars, contacts -- including contact pictures -- with most mobile devices and many mail clients integrated in the latest operating systems (e.g., Windows 8) as well as with Outlook 2013 for Windows.
- Exchange Web Services is an optional add-on that syncs SmarterMail messages, contacts, calendars and tasks to third-party email clients that support the protocol, including Microsoft Outlook 2015 for Mac from Office 365, Microsoft Outlook 2011 for Mac, Apple Mail, the Outlook client for iPad and eM Client..
- SyncML is a platform-independent synchronization standard that syncs SmarterMail mailboxes with Outlook 2007 and above (32-bit version), Thunderbird, and most mobile devices. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.
- CalDAV is an extension of the WebDAV protocol that syncs SmarterMail calendars natively with Macs, iPads, iPhones, Thunderbird, and other devices/applications that use the technology. Windows Phone 8 will eventually include native support for CalDAV and there are apps for Android that support CalDAV as well. More information on CalDAV implementations can be found by reviewing [Implementations of CalDAV](#) and [CardDAV](#) .

- CardDAV is an extension of the WebDAV protocol that syncs SmarterMail contacts -- including contact pictures -- natively with Macs, iPads, iPhones, and other devices/applications that use the technology. Windows Phone 8 will eventually include native support for CardDAV and there are apps for Android that support CardDAV as well. More information on CardDAV implementations can be found by reviewing Implementations of CalDAV and CardDAV .
- The Add to Outlook (Sharepoint Sync) feature within the SmarterMail Webmail interface uses two-way synchronization technology to sync a SmarterMail mailbox with Outlook 2007 or higher and provides read-only capability for Outlook 2003, including a user's shared resources. Calendars and contacts shared at the domain level are not supported. However, Sharepoint Sync does not support notification features, so items like SmarterMail calendar reminders will not be available within Outlook. In addition, Add to Outlook does not sync contact pictures. For full integration, Microsoft Exchange ActiveSync (for mobile devices and Outlook 2013 and above for Windows) or Microsoft Exchange Web Services (for Outlook for Mac and Apple Mail) should be used.

## Synchronized Devices

To view the devices and protocols used to synchronize your mailbox, log in to the SmarterMail interface and click the settings icon . Then expand the My Settings and Advanced Settings folders in the navigation pane and click Synchronized Devices . Logging of information, last successful synchronization and the ability to reset the synchronization state of devices is available from this area.

## Desktop Applications

SmarterMail supports synchronization with many desktop applications and email clients, including:

- Apple Address Book
- Apple iCal
- Apple Mail
- Windows 8 Mail
- Windows 8 Calendar
- Windows 8 Contacts
- Microsoft Outlook
- Mozilla Thunderbird --%>

## Apple OS X

Apple OS X is the primary operating system for the MacBook, Mac mini, iMac and Mac Pro lines of desktops and laptops.

## **Apple Address Book**

Apple Address Book is an application for Mac OS X users built for managing contact data. It is intended to be used in conjunction with Apple's Mail and iCal programs to provide Mac users with full email, calendar, and contact management.

### **CardDav**

Users can synchronize their SmarterMail contacts -- including contact pictures -- with Address Book using the CardDAV protocol. Support for CardDAV is built into both products, so there is no need to download and install additional applications to sync contact data.

For more information, refer to the KB article that applies to the OSX you are using:

- OS X 10.7 Lion: How To Sync SmarterMail with Apple Address Book and iCal
- OS X 10.6 Snow Leopard: How To Sync SmarterMail with Apple Address Book and iCal

### **SyncML**

This method synchronizes contacts by using the Funambol Sync Client for Mac OS X, which is available for download at <https://www.forge.funambol.org/download> . The Funambol Sync Client uses the SyncML 1.2 protocol, which is included within SmarterMail. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

## **Apple iCal**

Apple iCal is an application for Mac OS X users built for managing calendar data. It is intended to be used in conjunction with Apple's Mail and Address Book programs to provide Mac users with full email, calendar, and contact management.

### **CalDav**

Users can synchronize their SmarterMail calendars with iCal using the CalDAV protocol. Support for CalDAV is built into both products, so there is no need to download and install additional applications to sync calendar data. For more information, refer to the KB article that applies to the OSX you are using:

- OS X 10.7 Lion: How To Sync SmarterMail with Apple Address Book and iCal
- OS X 10.6 Snow Leopard: How To Sync SmarterMail with Apple Address Book and iCal

## **Apple Mail**

Apple Mail is an email application for Mac OS X users. It is intended to be used in conjunction with Apple's Address Book and iCal programs to provide Mac users with full email, calendar, and contact management.

## **Exchange Web Services**

The Exchange Web Services add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Users can use Exchange Web Services to sync messages with Apple Mail on computers running OSX 10.6 (Snow Leopard) or OSX 10.7 (Lion).

Once the Exchange Web Services add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the domain. For more information, refer to the KB article [How To Activate Exchange Web Services](#) .

Once the add-on is activated for the domain, users can sync to Apple Mail using the protocol. For more information, refer to the KB article [How To Synchronize SmarterMail with Apple Mail Using Exchange Web Services](#) .

NOTE: For mailboxes that will process and store large volumes of email, it is recommended that they be set up to connect to SmarterMail using IMAP as EWS performance suffers when processing large volumes of email.

## **Message Retrieval**

For SmarterMail users with Exchange Web Services, messages will automatically be synchronized with the Apple Mail. SmarterMail users that are using any of the other technologies to sync their mailboxes should set up an account within Apple Mail using either IMAP or POP3.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail.

## **Microsoft Windows 8**

Windows 8 is the latest operating system offered by Microsoft that is available for a variety of desktops, laptops and the Microsoft Surface tablet. Windows 8 includes an email client as well as both calendar and contacts applications as part of its default installation, similar to those same features offered by Apple's OS X operating system.

### **Windows 8 Mail**

Windows 8 Mail is an email client that comes pre-installed with Windows 8. It allows users to set up accounts using a variety of methods.

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and within Windows 8 Mail.

With the release of Windows 8, Microsoft integrated Exchange ActiveSync with both Microsoft Office 13 as well as within the Windows 8 Mail application that comes as part of the Windows 8 installation. Therefore, administrators and end users can set up Outlook 2013 and/or Windows 8 Mail using the Exchange ActiveSync add-on as well as via IMAP or POP. NOTE: Outlook 2010 and earlier DO NOT support Exchange ActiveSync. ActiveSync is only supported in Outlook 2013 and above.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

### **Message Retrieval**

For SmarterMail users with Exchange ActiveSync, messages will automatically be synchronized with Outlook. SmarterMail users that are using any of the other technologies to sync their mailboxes should set up an account within Windows 8 Mail using either IMAP or POP3, where possible.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way



communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail. (Note: If you have enabled Outlook to keep messages on the server, you will be able to access your messages and folders from any computer via the SmarterMail Web interface or your mobile device.)

### **Windows 8 People**

Windows 8 People is a contacts system that comes pre-installed with Windows 8. It allows users to set up contacts within Windows 8 that can be used for a variety of purposes (e.g., emailing).

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts -- including contact pictures -- in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and within Windows 8 Mail.

With the release of Windows 8, Microsoft integrated Exchange ActiveSync with both Microsoft Office 13 as well as within the Windows 8 Mail, People and Calendar applications that come as part of the Windows 8 installation. Therefore, administrators and end users can set up Outlook 2013 and/or Windows 8 Mail using the Exchange ActiveSync add-on as well as via IMAP or POP.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

### **Windows 8 Calendar**

Windows 8 Calendar is an calendar application that comes pre-installed with Windows 8. It allows

users to set up calendars within Windows 8 that can be used for a variety of purposes (e.g., keeping track of appointments).

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and within Windows 8 Mail.

With the release of Windows 8, Microsoft integrated Exchange ActiveSync with both Microsoft Office 13 as well as within the Windows 8 Mail, People and Calendar applications that come as part of the Windows 8 installation. Therefore, administrators and end users can set up Outlook 2013 and/or Windows 8 Mail using the Exchange ActiveSync add-on as well as via IMAP or POP.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

## **Cross Platform Options**

### **Microsoft Outlook**

Microsoft Outlook is an email client developed by Microsoft Inc. for managing messages, contacts, notes, tasks, and appointments and is commonly distributed as part of the Microsoft Office suite.

Outlook is offered on both the Windows and Mac OS X platforms. SmarterMail supports synchronization of email, contacts, calendars, tasks and notes with Outlook 2003 or higher, both on Windows and OS X.

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts -- including contact pictures -- in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and within Outlook.

With the release of Windows 8, Microsoft integrated Exchange ActiveSync with both Microsoft Office 13 as well as within the Windows 8 Mail application that comes as part of the Windows 8

installation. Therefore, administrators and end users can set up Outlook 2013 and/or Windows 8 Mail using the Exchange ActiveSync add-on as well as via IMAP or POP.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

### **Exchange Web Services**

The Exchange Web Services add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Users can currently use Exchange Web Services to sync messages, contacts, calendars and tasks with Outlook 2015 for Mac from Office 365, Outlook 2011 for Mac and Apple Mail. At this time, Outlook for Windows does not offer support for EWS.

Once the Exchange Web Services add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the domain. For more information, refer to the KB article [How To Activate Exchange Web Services](#) .

Once the add-on is activated for the domain, users can sync to Outlook using the protocol. For more information, refer to the KB article [How To Synchronize SmarterMail with Outlook 2011 for Mac Using Exchange Web Services](#) .

NOTE: For mailboxes that will process and store large volumes of email, it is recommended that they be set up to connect to SmarterMail using IMAP as EWS performance suffers when processing large volumes of email.

### **Add to Outlook**

The Add to Outlook (Sharepoint Sync) feature allows for two-way synchronization of calendars, contacts (but not contact pictures) and tasks with Outlook 2007 or higher, including a user's shared resources. Calendars and contacts shared at the domain level are not supported. For more information, refer to the KB article [How To Synchronize SmarterMail with Outlook Using the Add to Outlook Feature](#) . However, Sharepoint Sync does not support notification features, so items like SmarterMail calendar reminders will not be available within Outlook. For full integration, Microsoft Exchange ActiveSync (for mobile devices and Outlook 13 and above for Windows) or Microsoft Exchange Web Services (for Outlook for Mac and Apple Mail) should be used.

## **SyncML**

This method synchronizes contacts (but not contact pictures), calendars, tasks, and notes by using the Funambol Sync Client for Microsoft Outlook, which is available for download at [http://forge.ow2.org/project/showfiles.php?group\\_id=96](http://forge.ow2.org/project/showfiles.php?group_id=96) . The Funambol Sync Client uses the SyncML 1.2 protocol, which is included within SmarterMail. Funambol SyncML works for Outlook 2007 and above (32-bit only). NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

For more information, refer to the KB article [How To Synchronize SmarterMail Accounts with Outlook Using SyncML](#)

## **Message Retrieval**

For SmarterMail users with Exchange Web Services, messages will automatically be synchronized with Outlook. SmarterMail users that are using any of the other technologies to sync their mailboxes should set up an account within Outlook using either IMAP or POP3.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail. (Note: If you have enabled Outlook to keep messages on the server, you will be able to access your messages and folders from any computer via the SmarterMail Web interface or your mobile device.)

## **Mozilla Thunderbird**

Mozilla Thunderbird is a free, open source email client developed by the Mozilla Foundation. SmarterMail supports synchronization of email, contacts and calendars with Thunderbird 3.

## **SyncML**

Users can synchronize contacts (but not contact pictures) and calendars with Thunderbird using the Funambol and the Lightning add-ons. Both add-ons are available for free from the Mozilla Thunderbird website. The Funambol add-on uses the SyncML 1.2 protocol to synchronize collaboration items and the Lightning add-on provides calendar functionality for Thunderbird. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

After installing the add-ons, users will need to configure the Funambol add-on from within the Thunderbird interface.

For more information, refer to the KB article [How To Install and Configure Lightning and Funambol for Thunderbird](#)

## **CalDav**

Users can also synchronize their SmarterMail calendars with Thunderbird using the CalDAV protocol and the Lightning add-on. For more information, refer to the KB article [Sync with Thunderbird Using CalDAV for Lightning](#)

## **Message Retrieval**

For messages, users should set up an account within Thunderbird using either IMAP or POP3.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail.

## **Mobile Devices**

SmarterMail supports synchronization with most mobile devices on the market, including:

- Apple iOS
- BlackBerry
- Google Android
- Symbian
- Windows Phone

## **Apple iOS**

Apple iOS devices include the iPod Touch, iPhone and the iPad. SmarterMail supports synchronization of email, contacts, and calendars with iOS devices.

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts -- including contact pictures -- in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and the mobile device.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

For synchronization instructions for a specific mobile device, refer to the manufacturer's website. Additional information may be available in the SmarterTools Knowledge Base.

### **CardDAV and CalDAV**

SmarterMail users that choose not to purchase the Exchange ActiveSync add-on can synchronize their SmarterMail contacts -- including contact pictures -- and calendars with iOS devices using the CardDAV and CalDAV protocols. Support for CardDAV and CalDAV is built into these products, so there is no need to download and install additional applications to sync contact and calendar data.

For more information, refer to the KB article that applies to the OSX you are using:

- OSX 10.7 Lion: [How To Sync SmarterMail with Apple Address Book and iCal](#)
- OSX 10.6 Snow Leopard: [How To Sync SmarterMail with Apple Address Book and iCal](#)

## **SyncML**

A third solution is also available to sync contacts over-the-air. This solution uses the iPhone Sync Client from Funambol, which is available for download in Apple's App Store. The iPhone Sync Client uses the SyncML 1.2 protocol, which is included within SmarterMail. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

For more information, refer to the KB article [How To Synchronize SmarterMail with Mobile Devices Using SyncML](#) .

## **BlackBerry**

BlackBerry is a line of smartphones developed by Research In Motion. SmarterMail supports synchronization of email, contacts, calendars, tasks, and notes with the BlackBerry.

## **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and the mobile device.

Although the Blackberry does not directly support over-the-air synchronization with Exchange ActiveSync, there are two applications available for purchase that enable Exchange ActiveSync functionality on the Blackberry: AstraSync and NotifySync. For more information, refer to [www.astrasync.com](http://www.astrasync.com) and [www.notifysync.com](http://www.notifysync.com) .

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

For synchronization instructions for a specific mobile device, refer to the manufacturer's website. Additional information may be available in the SmarterTools Knowledge Base.

**SyncML**

For those users that choose not to purchase the Exchange ActiveSync add-on, an alternate solution is available to sync contacts (but not contact pictures), calendars, tasks, and notes over-the-air. This solution is to use the BlackBerry Sync Client from Funambol, which is available for download at [http://forge.ow2.org/project/showfiles.php?group\\_id=96](http://forge.ow2.org/project/showfiles.php?group_id=96) . The BlackBerry Sync Client uses the SyncML 1.2 protocol, which is included within SmarterMail. The client supports most BlackBerry devices, and SmarterTools has tested models 8830, 8810, and Curve devices. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

For more information, refer to the KB article [How To Synchronize SmarterMail with Mobile Devices Using SyncML](#) .

**Message Retrieval**

For regular and push email usage, SmarterTools offers the following methods:

- The BlackBerry Internet Service is a free method to push email to your Blackberry and is a service provided by your mobile phone provider (Sprint, Verizon, etc.) and can be configured to check your SmarterMail mailbox and push all new and unread messages to your mobile phone. Messages are normally pushed to the BlackBerry device with a short delay. This can be configured with any version of SmarterMail as the BlackBerry Internet Service will connect to the mailbox via the IMAP protocol.
- An alternative free method to push messages to your mobile phone which is normally only delayed a couple minutes and simulates the expensive BlackBerry Enterprise Server (BES) which is often associated to Microsoft Exchange is to use the open source provider Funambol. By signing up with the free Funambol service, you can (just as with the BlackBerry Internet Service), configure Funambol to scan your SmarterMail mailbox for new and unread messages. If a new message is found, the Funambol service will push the message to the BlackBerry device and the Funambol client program. When you sign up for the Funambol service, they will provide you the appropriate client that should be installed on your BlackBerry device. This method provides a significant cost savings over the formal BES method with only a modest diminishment in performance.
- Since the BlackBerry is focused on pushing email, many consumers who are familiar with IMAP and PocketPCs miss the advantage of having access to all their messages that they see within Outlook or the webmail interface. For people who would like to log into the SmarterMail mailbox from the BlackBerry and see all of their messages as if they were in webmail,



additional clients can be installed on the BlackBerry, such as the free open source application LogicMail .

### **Google Android**

Android is an operating system designed for use in a variety of smartphones and mobile devices. Examples of devices that run on Google Android include the Motorola Droid 3, Samsung Galaxy Tab, and HTC Droid Incredible. In addition, the Kindle Fire runs on a modified version of the Android operating system. SmarterMail supports synchronization of email, contacts, and calendars with Android devices.

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts -- including contact pictures -- in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and the mobile device.

Note: Only Android devices running version 2.0 or later support synchronization via Exchange ActiveSync. Support for Exchange ActiveSync may also vary by device. For example, Exchange ActiveSync does not support Corporate Calendar or email applications for the Motorola Droid, Droid 2 or Droid X because they are custom applications that do not comply with Exchange ActiveSync specifications.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

For synchronization instructions for a specific mobile device, refer to the manufacturer's website. Additional information may be available in the SmarterTools Knowledge Base.

### **CardDAV and CalDAV**

SmarterMail users that choose not to purchase the Exchange ActiveSync add-on can synchronize their SmarterMail contacts and calendars with Android devices using the CardDAV and CalDAV protocols. While the default calendar and contacts apps may NOT support either protocol, there are some Android apps that do support both. IN addition, there are CalDAV and CardDAV specific apps that

can facilitate synchronization, though these may be paid apps. More information and implementations of CalDAV and CardDAV can be found by reviewing [Implementations of CalDAV and CardDAV](#) .

### **Message Retrieval**

For SmarterMail users with Exchange ActiveSync mailboxes, messages will automatically be pushed to their mobile devices as they are received. SmarterMail users that are using any of the other technologies to sync their mailboxes with a mobile device should set up an account within the mail application provided on the mobile device using either IMAP or POP3.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail.

### **Windows Phones**

Windows Phone is a compact operating system developed by Microsoft and designed for use in a variety of smartphones and mobile devices. Examples of devices that run on Windows Phone (or the Windows Mobile OS) include the Samsung Focus, HTC HD7 and Nokia Lumia. SmarterMail supports synchronization of email, calendars, contacts, tasks and notes with Windows Phones.

### **Microsoft Exchange ActiveSync**

The Microsoft Exchange ActiveSync add-on is available as an optional add-on for SmarterMail Enterprise and can be purchased from the SmarterTools website. Unlike the other synchronization methods, Exchange ActiveSync uses direct push technology to sync email, calendars, and contacts -- including contact pictures -- in real time, ensuring any changes to collaboration data are automatically recorded in both SmarterMail and the mobile device.

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail and enable the add-on for the user's mailbox. For more information, refer to the KB article [How To Activate Microsoft Exchange ActiveSync](#) .

If SmarterMail is running under IIS, the system administrator will also need to disable Windows authentication before adding Exchange ActiveSync to specific mailboxes. For more information, refer to the KB article [How To Configure IIS for Microsoft Exchange ActiveSync](#) .

For synchronization instructions for a specific mobile device, refer to the manufacturer's website. Additional information may be available in the SmarterTools Knowledge Base.

### **SyncML**

SyncML For those users that choose not to purchase the Exchange ActiveSync add-on, an alternate solution is available to sync contacts (but not contact pictures), calendars, and tasks over-the-air. This solution is the Pocket PC Sync Client or SmartPhone Sync Client Funambol, which are available for download at [http://forge.ow2.org/project/showfiles.php?group\\_id=96](http://forge.ow2.org/project/showfiles.php?group_id=96) . These sync clients use the SyncML 1.2 protocol, which is included within SmarterMail. NOTE: As of SmarterMail 10.x, SyncML support is no longer being updated as there are fewer and fewer SyncML clients that are continuing development and support. That being said, SyncML will continue to work "as-is" in current and future versions of SmarterMail.

For more information, refer to the KB article [How To Synchronize SmarterMail with Mobile Devices Using SyncML](#) .

### **Message Retrieval**

For SmarterMail users with Exchange ActiveSync mailboxes, messages will automatically be pushed to their mobile devices as they are received. SmarterMail users that are using any of the other technologies to sync their mailboxes with a mobile device should set up an account within the Pocket Outlook application provided on the mobile device using either IMAP or POP3.

IMAP is a robust protocol that easily handles mailboxes that process and/or store large volumes of email. In addition, IMAP idle is an optional feature of the IMAP protocol that pushes all new messages out as they are received by the mail server. Unlike POP, IMAP offers two-way communication between your SmarterMail mailbox and your email client(s). This means when you log in to the SmarterMail Web interface, actions you performed on email clients and mobile devices will automatically appear in the Web interface (and vice versa). In addition, IMAP keeps all messages and folders on the server whereas POP downloads all messages to an email client.

With POP3, your mail is saved in a mailbox on the remote server until you check your mail. When you check your mail, all of the mail is downloaded to your computer and is no longer maintained on the server. If you use POP3 and are traveling or check your mail from multiple locations, you will not be able to view any of your old mail because the messages only exist on the computer on which you originally received your mail.

## My Today Page

Upon logging in to SmarterMail for the first time, the My Today Page will load. This page provides is divided into five sections and gives users an at-a-glance view of their account. Note: Although the My Today Page is the default page upon login, users can configure SmarterMail to load their inbox upon login instead. For more information, please refer to [Account Settings](#) .

- **Calendar** - Lists upcoming meetings and events, by day and time, for the current week. See the [Calendars overview](#) for more information.
- **Unread Messages** - Lists the number of unread messages in your inbox and in your drafts and junk e-mail folders. Seeing the number of items in your junk e-mail folders can help with any potential disk space issues. For example, if you are closing in on a disk space limit and have a lot of messages in your junk e-mail folder, clearing out those messages may recover some disk space for your mailbox.
- **Disk Space Limits** - Lists the amount of available disk space and the amount of space currently being used. These are set by the domain administrator. Therefore, if you notice that you are nearing a limit, contact your domain administrator for more information on how to recover some disk space.
- **Tasks** - Lists any unfinished tasks you may have. See the [Tasks overview](#) for more information.
- **Latest RSS Items** - Lists the most recent updates to the RSS feeds to which you are subscribed. See the [RSS Feeds overview](#) for more information.

## Email

### Email Overview

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

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

## Navigating Your Inbox

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

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

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

## Performing Email Actions

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

- **Actions** -
- **New Folder** - Select this option to create a new folder. Note: Users should create new folders in the root of the folder tree and NOT inside their Inbox. This is because many email clients have a hard time syncing with folders that are created inside a user's Inbox.
- **Rename Folder** - With the desired folder selected, click this option to rename the folder. Note: Default folders can not be renamed. This option applies only to additional folders that have been created.
- **Delete Folder** - With the desired folder selected, click this option to delete the folder. Note: Default folders can not be renamed. This option applies only to additional folders that have been created.
- **Disposable Address** - Select this option to create a randomly generated address, completely independent of a user's current email address. This email address acts as a timed alias, forwarding mail to the designated folder for the time specified. When the time limit has been

reached, the address is no longer valid and email will not reach your mailbox from this address. (This option is useful when temporarily signing up for newsletters, when an alternate email address is only needed for a short amount of time, etc.) Only one Disposable Address may be created at a time. After creation, extend the time remaining or revoke the address by clicking on Disposable Address again in the Actions toolbar and choosing the corresponding button. Choosing to extend the address will add 4 more hours to the remaining time. Note: Temporary email accounts automatically bypass greylisting and spam checks; however, they still run through any virus scan, if set up.

Note: For more information on the folder options above, see [Managing Email Folders](#) .

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

- New - Click this button to create a new email message.
- Actions - Click this button and select the appropriate option to mark messages, move messages, forward multiple messages or block/unblock senders.
- Mark - Click this button and select the appropriate option to mark the selected message(s) as read, unread, follow-up, no follow-up, spam, or not spam.
- Read - Marks the selected message(s) as read and changes the status indicator appropriately.
- Unread - Marks the selected message(s) as unread and changes the status indicator appropriately. This can be useful for reviewing messages at a later time.
- Follow-up - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next the message to mark it for follow-up.
- No follow-up - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next to a message marked for follow-up to remove the follow-up flag.
- Spam - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with the Message Sniffer or Cyren Premium Antispam add-ons, messages marked as spam will be sent to the appropriate center for evaluation.
- Not Spam - Marks the selected message(s) as not spam and automatically adds the email address to your trusted senders list.
- Move - Moves the selected message(s) to any available folder. Note: You can also drag-and-drop messages to an available folder.

- Forward - Forwards the selected message(s). Note: This option is best used when trying to forward multiple messages as .eml attachments.
- Block Sender - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted.
- Unblock Sender - Allows the sender of the selected message(s) to begin sending messages to the account again by removing the address from the Internal Blocked Senders content filter.
- Delete - Click this button and select the appropriate option to delete, undelete, purge deleted messages, or delete all messages in a folder.
- Delete - Moves the selected message(s) to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Undelete - Retrieves deleted messages from your Deleted Items folder provided the system hasn't been purged yet. Note: After the system purges any items marked for deletion, you can't retrieve the deleted messages.
- Purge Marked as Deleted - Permanently deletes the messages in your Deleted Items folder. Note: This action cannot be undone.
- Delete All Messages in Folder - Moves all of the messages within a selected folder to the Deleted Items folder. This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not. This option is most useful in folders like Junk E-Mail or Deleted Items.
- View - Click this button and select the appropriate option to filter messages or refresh the content pane.
- Refresh - Manually refreshes the list of messages in the content pane.
- Filter - Filters messages based on the criteria you choose: messages that have been read/unread, replied to or not or forwarded.

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

- Reply - Allows you to reply to the the sender only.
- Reply All - Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
- Forward - Sends the message to someone else.
- Delete - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Add - Creates a new task and links it to the message. For more information, see [Linking to](#)

Email Tasks .

- View - Allows you to view the original message in alternate formats, including HTML (default), as text only, view the raw content of the message (including the header) or view the header only. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.
- Print - Prints the message.

## Reading Email Messages

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

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

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

In general, the following options are available when viewing a message in a pop-up window:

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



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

## Downloading Email Attachments

If the message has an attachment, a paperclip will display in the header of the message. In addition, an attachments tab will display under the message header in the preview pane. To view a file that was attached to a message, click the attachments tab and then click the appropriate file. Attachments can be downloaded and viewed individually or it's possible to download all attachments in one .ZIP file by simply clicking the Download All Attachments link that appears at the top of the Attachments tab.

SmarterMail also makes it easy for users to see all messages that contain attachments. Simply, expand the By Type click All Attachments at the bottom of the navigation pane.

## Composing Email Messages

It's very easy to create new messages in SmarterMail as well as reply to existing messages or forward messages on to other individuals or groups. Below you'll find a brief walkthrough of each scenario.

### Creating a New Message

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

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

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

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

- **Send** - Sends your message to the designated recipients.
- **Save as Draft** - Saves the message in its current state to the Drafts folder without actually sending it. This is useful if you need to continue writing the message at a later time.
- **Attach Files** - Allows you to attach files to the message. When files are attached to an outgoing message, a file manager will display at the bottom of the new message window. The file manager will display the name, size, and upload status of the file. Attachments must reach an upload status of 100% before the item is actually attached to the message. In addition, files that are attached to messages should NOT contain commas as this will corrupt the upload and attachment. Note: To remove an attached file prior to sending the message, click the trash icon in the file manager.
- **Link From** - Uses SmarterMail's File Storage feature to insert a link to a file saved on the mail server or connect a Google Drive account to SmarterMail. Either way, the links can be sent to recipients who can then download the linked file(s).
- **Flags** - Specifies delivery options and/or marks the message for follow-up.
- **Message Priority** - Specifies the importance of the message. By default, messages have a normal level of priority.
- **Request a Read Receipt** - Sends an email confirmation to the sender when the recipient opens the message.
- **Mark for Follow-up** - Marks the message for follow-up. For more information, see [Marking Email for Follow-ups](#) .

## Replying to Email Messages

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

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

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

## Forwarding Email Messages

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

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

When forwarding a message, SmarterMail automatically fills in the subject field with the subject from the original message preceded by "Fwd" (which means "Forward"), and the text box with the text from the original message. It is possible to edit any of these pre-filled fields, however, as needed. All other message options are the same as when composing a new message.

## Additional Options

- Delete - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Move - Moves the selected message(s) to any available folder.
- Mark - Click this button and select the appropriate option to mark the selected message(s) as follow-up, no follow-up, or spam.
- Follow-up - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately.
- No follow-up - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately.
- Spam - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with the Message Sniffer or Cyren Premium Antispam add-on, messages marked as spam will be sent to the appropriate center for evaluation.
- Add - Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- View - By default, SmarterMail displays messages in HTML format because it provides formatting and markup capabilities that are not available in plain text. However, there may be times when you want to view the message in a different format or you need to view more than the message content. The different view options are as follows:

- HTML - Displays the message in HTML format, which allows for colors, fonts, graphics, and other formatting.
- Text - Displays the message in plain text, which only allows text content with no special formatting or graphics.
- Raw Content - Displays the content of the email exactly as the server received it. This is helpful if you cannot view the message in any other display mode.
- Header - Displays the header of the message, which indicates the path the email took to get to your email account, along with several other pieces of information.
- Print - Prints the message in whatever View you're in. For example, if you're viewing the raw content of the message then hit the print button, you will print the raw content.
- Close - If a message is opened in a new window, this closes the window.

## Searching Email Messages

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

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

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

## Deleting Email Messages

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

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

- Move to Deleted Items folder - When items are deleted they are moved to the Deleted Items folder. If the Deleted Items folder does not exist, it will be created automatically the first time you delete a message.
- Auto-purge folder - When using IMAP or webmail and messages are deleted from a folder, they are only marked as deleted. Messages are not physically removed from the folder until they are purged. This option will automatically purge the folder after deleting the message. Note:

When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.

- Mark as deleted - When the message is deleted with this option, the message remains in the current folder, but will be crossed out and marked as deleted. If the folder is then purged, all items marked for deletion will be removed.
- Mark as deleted and hide - With this option, any message that has been marked as deleted will be hidden from view in webmail. This will allow you to keep deleted messages without seeing them every time you log into your mailbox. Note: It is important to keep an eye on your email account disk usage when using this option, as your mailbox may be fuller than you realize.

It is important to note that the action taken for deleted items will ONLY be taken when deleting items through webmail. Deleting an item from Outlook or another email client will NOT use the setting that you choose. Note: When your email client connects to SmarterMail via POP3, any emails that are marked as deleted are automatically purged. To prevent this from happening, select the Move to Deleted Items folder option to avoid accidentally purging deleted items.

## Undeleting Messages

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

## Effects of Folder Auto-clean

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

## Marking Email for Follow-up

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

There are a couple of ways for users to flag a message. The first is to simply click on the flag icon at the far right side of the message list in the content pane in webmail. Secondly, users can select the

desired message and click the Actions menu in the content pane toolbar, then click Mark and click Follow-up . In both instances, the flag icon will turn red and the message will also appear in the follow-up view, giving you easy access to all messages that require a further action.

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

## Finding Flagged Messages

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

## Removing a Follow-up Flag

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

## Linking Email to Tasks

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

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

## Finding Messages with Linked Tasks

To quickly view all emails that are linked to tasks, expand the By Type treeview menu option at the bottom of the navigation pane and click Linked to Tasks to display all messages that also have tasks attached to them.

## Managing Email Folders

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

- **Inbox** - All incoming messages automatically go to your Inbox folder. You can read your mail in the Inbox, then delete it, move it to another folder or leave it in the Inbox. Note: If you have set up content filtering for your mailbox, incoming messages may bypass your Inbox per your content filtering settings.
- **Deleted Items** - When you delete messages, by default they're moved to the Deleted Items folder. (Just know that, this default action can change based on your settings - see [Deleting Email Messages](#) for more information). Messages in the Deleted Items folder can be deleted at any time without warning depending on any auto-clean settings your system administrator has in place, so it's best if you don't delete messages if you think you'll want them later. The Deleted Items folder is the default folder SmarterMail creates for deleted items. When migrating from other email systems to SmarterMail, the migration may create a different folder for deleted items based on what that email system uses as its default. Note: When creating folders, it's not recommended to create them within the Inbox as many email clients, especially mobile clients, have difficulty syncing folders created within the Inbox. For more information on creating folders, see the corresponding section, below.
- **Drafts** - This folder holds messages that you've composed but haven't sent yet. A message saved in your Drafts folder stays there until you either send it or delete it. SmarterMail allows users to adjust the time a new message is automatically saved. For more information, see the [Auto Save Frequency](#) description on the [Account Settings](#) page.
- **Junk E-mail** - Messages SmarterMail believes to be junk mail bypass your inbox and go to the Junk E-mail folder. You should periodically check this folder to ensure that valid messages were not accidentally delivered to the Junk E-mail folder. When valid email is delivered to the Junk E-mail folder, select the message and click the Actions menu in the content pane toolbar. Then click Mark and select Not Spam .
- **Sent Items** - All outgoing messages are automatically saved to your Sent Items folder, making it easy to review or resend a message if necessary. Note: This folder only displays if it has been enabled in account settings. In addition, messages sent from a third-party client such as Outlook will not be saved in the Sent Items folder.

## Creating Email Folders

To make your email easy to manage, SmarterMail lets users create as many personal mail folders as they want. Personal folders help users organize incoming and outgoing messages in ways that make



sense to the individual user. That being said, creating a very large number of folders sub-folders can impact the performance of any email server, not to mention syncing your account with email clients. Note: When creating new folders, DO NOT create sub-folders within your Inbox. While technically possible, many third-party email clients and most mobile devices can not sync sub-folders that are part of a user's Inbox.

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

To make your SmarterMail folders available from a third-party email client such as Microsoft Outlook, when you set up the account in your client you will need to set it up using IMAP as your incoming mail server type. If you use POP mail, you only have access to your SmarterMail inbox, not any personal mail folders you created to organize messages. In addition, when using syncing protocols like Microsoft Exchange ActiveSync (EAS), any folders that are created will also sync with whatever mobile or desktop client you're setting up with EAS. Just be aware of the issues noted previously with the number of folders and sub-folders that exist as well as the issues with syncing sub-folders created within your Inbox.

## Moving Messages to Another Folder

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

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

## Renaming and Deleting Folders

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

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

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

## Message Archive Search

This feature is available to domain administrators and/or system administrators using SmarterMail Enterprise.

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

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

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

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

For more information on archiving, see Message Archiving .

## Chat

### Chat Overview

This feature is only available in SmarterMail Enterprise.

SmarterMail's chat feature allows users on the domain to chat with each another, instantly and securely, right within the webmail interface or by using most third-party chat clients that support the XMPP (Jabber) protocol. There's no doubt email is a great communications mechanism, but there are times when real-time communication is crucial. Note: If your SmarterMail installation is deployed using the default Web server, the chat functionality will not work. SmarterTools recommends

converting to IIS for chat to function properly. For information on converting to IIS, refer to Running SmarterMail as an IIS Site .

To access the chat feature, click the chat icon . For help understanding the different areas of chat, see the chat interface diagram .

Note for tablet users: In many cases, tablet operating systems and applications are simplified in order to preserve battery life. For example, many mobile browsers will restrict the number of concurrent threads that can be used to access the same resource. In those cases users will need to use third-party chat clients such as IM+, IMO or others to use SmarterMail's live chat on a tablet or smartphone.

Therefore, the live chat icon is not available in the Web interface for SmarterMail when viewed on a tablet or smartphone.

## Navigating Your Chat Contacts

The chat section of SmarterMail is divided into three main areas:

- The navigation pane displays the contacts on your domain you can chat with. To view details for a specific contact, simply click the desired contact.
- The content pane displays all available details about the selected contact.
- The preview pane displays a list of the most recent chat conversations, as well as any attachments, appointments or email messages, related to the selected contact.

Note: The same information is available for any email aliases you may be a member of. For example, an alias for salesteam@example.com may be used to send chat messages to all members of that department that are online and functions identically to an individual chat contact.

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

- Chat - Starts a chat with the selected contact/alias in a new window.

## Changing Your Chat Status

Users can manage their chat status within the webmail interface by clicking the chat status menu in the upper right corner. Users can change their status to one of the following:

- Available - You are available to receive and respond to chat messages via the webmail interface. When a user is marked as Available, they will see other members of their domain who are also active and available in chat.
- Away - You are logged into chat, but are away from your computer and may not respond right away.
- Busy - You are logged into chat, but are busy and may not respond to right away.
- Offline - You are logged out of chat in the webmail interface and cannot receive chat messages

using the webmail interface. In addition, all other members of your domain will all appear Unavailable. However, if you are using a third-party client for chat, and are logged into that chat client, setting your chat status to offline in webmail will not affect your chat status in the third-party client. Therefore, chats will only display in your third-party client rather than in both the client and the webmail interface.

## Viewing a Contact's Chat History

On occasion, you may need to refer to a previous chat conversation you had with a contact. To review the chats you've had with a specific contact, select the desired contact in the navigation pane. A Chat tab with the list of recent chat conversations will load in the preview pane, regardless of whether they occurred within the Web interface or using a third-party chat client. To view the details of the chat conversation, simply select the desired conversation and click Open . The chat history will open in a new window. Saving chat history is a default action and can not be turned off at the domain or system level.

In addition, as SmarterMail indexes all communication, other tabs are shown as well, including tabs for email Messages, calendar Appointments and Attachments.

## Searching Chat Contacts

This feature is only available in SmarterMail Enterprise.

If there are a large number of users on the domain, finding a specific chat contact can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find chat contacts quickly and easily.

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

## Connecting to Third-Party Chat Clients

This feature is only available in SmarterMail Enterprise.

If you prefer to use a third-party client to receive and respond chat messages, you will need to ensure the chat client supports the XMPP (or Jabber) protocol. Examples of chat clients that support XMPP include Adium, Digsby, iChat, Pandion, Pidgin and Trillian.

More information on integrating SmarterMail's chat feature with commonly used third-party clients may be found in the SmarterTools Knowledge Base .

## Contacts

### Contacts Overview

SmarterMail features an online contact manager that helps users organize and communicate with the people in their life. Users can view and manage their contacts from any computer with Internet access, anywhere in the world, using the webmail interface.

To access your contacts, click the Contacts icon . To view different contact lists (such as the Global Address List, shared lists, or mapped resources), use the Contacts Selector at the top of the navigation pane and select the contact list you want to view. Depending on your overlay settings found in the View menu, you can view multiple contact lists together or toggle between views.

For help understanding the different areas of the contacts section, see the contacts interface diagram .

### Navigating Your Contacts

When you view your SmarterMail contacts, the page is divided into three sections:

- The navigation pane displays the contacts in the list you are viewing. To view details for a specific contact, simply click the desired contact.
- The content pane displays all available details about the selected contact.
- The preview pane displays a list of the most recent messages, appointments, chats and attachments related to the selected contact.

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

- New - Creates a new contact.
- Actions - Click this button and select the appropriate option to delete contacts, send email to contacts, import/export contacts, or add the contacts to Outlook.
- Select All - Selects all contacts in the list you are viewing.
- Delete - Deletes the selected contact(s).
- Send Email - Addresses an email message to the selected contact(s).
- Send vCard(s) - Allows you to send an email with the the selected contact(s) electronic business card(s) (vCard) attached.
- Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes contact information. Note: This feature is only available in SmarterMail Enterprise.

- **Import/Export** - Import or export some or all of your contacts in vCard or comma separated value (CSV) format. For more information, see [Importing and Exporting Contacts](#) .
- **Import** - Allows you to import contacts from another email system into your contact database. SmarterMail can bulk import contacts in either vCard or CSV format.
- **Export to vCard** - Exports only the selected contact(s) in vCard format.
- **Export all to vCard** - Exports all of your contacts in vCard format.
- **Export to CSV** - Exports only the selected contact(s) in CSV format.
- **Export all to CSV** - Exports all of your contacts in CSV format.
- **View** - Click this button and select the appropriate option to filter contacts by category, sort contacts, or choose the details (Visible Fields) that are displayed about a contact in the navigation pane.
- **Filter** - Filters contacts by the selected category. Categories are created when you add new contacts to your address book. For more information, see [Creating New Contacts](#) .
- **Sort** - Sorts contacts by display name, email, or company in ascending or descending order.
- **Visible Fields** - Choose which contact details are displayed in the navigation pane.
- **Overlay Contacts** - When unchecked, adjusting the Contact Selector will toggle views rather than overlaying contact lists to view multiple resources at one time. Note: Due to the way the Global Address List (GAL) is generated, the Global Address List cannot be overlaid with the default Contact list or shared contacts.

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

- **Edit** - Edits the selected contact.
- **Delete** - Deletes the selected contact. Note: When accessing the Global Address List, the ability to delete contacts depends on the permissions granted. For example, if the GAL is read-only, the delete button will not appear.
- **Download vCard** - Saves the contact information as an electronic business card, which can later be imported to another program such as Outlook or sent through email as an attachment.

## Viewing Items Related to a Contact

To help users better understand their relationships and communications with each contact, SmarterMail automatically displays a list of recent messages, appointments, attachments and live chats related to each contact. This information can be found in the related items grid in the preview pane.

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

- **Open** - Opens the selected message, appointment, attachment or live chat related to the contact.

- Delete - Deletes the selected message, appointment, attachment or live chat related to the contact.

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

## Creating New Contacts

There are several ways to add new contacts to SmarterMail, depending on whether you want to add a contact from an email message, import contacts from another provider, or add a contact by typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, simply view the desired message either by double clicking on it or viewing it in the preview pane. SmarterMail includes "touch and go" functionality that highlights all email addresses in the header of the message. By clicking on a highlighted address, a small window opens with three options: Email, Add/Edit Contact and Block Sender. Click the Add/Edit Contact link and a new contact window opens up. SmarterMail will automatically complete the display name and email address fields, then you can enter additional details and save the contact.

To add a contact by typing the name and other information directly in SmarterMail, click New in the navigation pane toolbar and then click Contact . This will open a new contact window that you will use to add the contact to SmarterMail. In addition, you can create a new contact within the Contacts section of SmarterMail.

For information on adding new contacts by importing contacts from another email service, see [Importing and Exporting Contacts](#) .

## Saving Contact Details

When you add a new contact to SmarterMail, you can save as many or as few details about the person as you like. In general, contact details are divided into five sections:

- Personal Info - Type the contact's display name, title, first name, middle name, last name, suffix, email address(es), instant messenger, home page, and date of birth. Note: The display name is the only required field to save a contact.
- Add a Picture - SmarterMail allows you to upload a picture for any contact in your address book. These pictures are available within the webmail interface and for anyone using CardDAV or the Microsoft Exchange ActiveSync add-on to sync their calendars with email clients and/or

mobile devices. Unfortunately, pictures will not sync for customers using Add to Outlook for synchronization. Upload a contact picture by dragging and dropping a file in the highlighted area or clicking to browse for a file.

- Contact Info - Type the contact's home phone number, work phone number, mobile phone number, pager number, home and work fax numbers, and home address.
- Work Info - Type the contact's company name, job title, department, office, work address, and website URL.
- Additional Info - Type any additional details about the contact.

## Master Categories

Categories are a great way to organize your contacts. Using categories, you can organize business, personal or any other type of contact into tidy circles, keeping people separated based on whatever criteria you want. Contacts can be in multiple categories or none. It's up to you. Note: Categories are only a way to organize contacts. They are NOT ways to send emails to a group of individuals. For that you would want to create an Alias or use SmarterMail's Mailing List feature.

- To add a category, simply click the Master Categories button and type the new category name.

Note: Be sure to separate categories with a comma.

## Searching Contacts

If you have a large number of people in your contacts list, finding a specific contact can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find contacts quickly and easily.

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

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

## Importing and Exporting Contacts

Because people often have multiple email accounts from different providers, SmarterMail makes it easy for users to securely transfer contacts to and from other online address books.



## Importing Contacts to SmarterMail

SmarterMail supports importing contacts from two different types of files: vCards (.vcf) and comma-separated text files (.csv). SmarterMail also supports importing from a .zip file containing any combination of these file formats. For step-by-step instructions on importing contacts to SmarterMail, please refer to the KB article [How To Import Contacts to SmarterMail](#) .

## Exporting Contacts from SmarterMail

Contacts can be exported individually in vCard or CSV format or in bulk as a .zip file containing either vCard or CSV files. These files can then be imported into Microsoft Outlook or into another SmarterMail account. For step-by-step instructions on exporting contacts from SmarterMail, please refer to the KB article [How To Export SmarterMail Contacts](#) .

## Sending Contacts from SmarterMail

SmarterMail also allows users to email contact data as vCard files. For step-by-step instructions, please refer to the Kb article [How To Send a Contact as a vCard](#) .

## Global Address List

The Global Address List, sometimes referred to as the "GAL," is most commonly identified with Microsoft Exchange. The GAL is essentially a directory service within SmarterMail that contains a dynamic list of all contact information for every user on your domain. While individual mailboxes are contained within the GAL, domain administrators can further manage what's included in the GAL in order to hide users that may not represent real people, such as a [support@example.com](#) alias and/or mailing lists.

Contact information for the Global Address List is pulled from the individual account profiles of users. To update your listing, click the settings icon . Then expand the My Settings folder and click Account Profile in the navigation pane.

Note: If the Global Address List is enabled for your domain, all information you enter into your profile can be seen by all other members of your domain.

The Global Address List functions almost identically as My Contacts.

# Calendar

## Calendar Overview

SmarterMail's calendar feature takes the burden out of organizing your schedule and is accessible from any desktop, laptop or mobile device with Internet access. SmarterMail's calendar system is extremely flexible and includes many options that make it easy to keep track of important events, including:

- Ability to create and sync multiple personal calendars.
- Fully configurable appointments with optional recurrence rules.
- Email notification and notification within SmarterMail of upcoming appointments.
- Overlay view to display multiple calendars, tasks and conference rooms on the same calendar.
- Attendee and invitation status tracking.
- Conference room availability and scheduling.
- Availability information about attendees (Enterprise Edition only).
- Integration with Outlook (Enterprise Edition only).

To access your calendar, click the Calendar icon . Depending on your account settings, the daily, weekly, monthly, or all appointments calendar view will load. To view multiple resources at once or to toggle between views, use the Resource Selectors (dropdown menu options at the top of the content pane toolbar) and check the desired resource. Items found in these dropdowns are based on a user's personal calendars and task list and any domain/user shared resources that have been mapped.

For help understanding the different areas of the calendar, see the calendar interface diagram .

## Navigating Your Calendar

When you view your SmarterMail calendar, you can toggle between four different views:

- Daily - The daily view is a planner-type view that displays all appointments scheduled for the day. If configured, this view also displays the weather forecast for the date you are viewing and any applicable start or due times for tasks.
- Weekly - The weekly view is intended as more of an agenda-type view and displays all appointments scheduled for the week. If configured, this view also displays the 7-day weather forecast and the start and due dates for tasks.
- Monthly - The monthly view displays all appointments and tasks scheduled for the month. It serves as an at-a-glance type of calendar that outlines a general idea of the upcoming events over the next 30 days.

- All Appointments - The all appointments view lists all appointments on your calendar and can be sorted by the appointment subject, start date, or end date.

There are a couple of ways to differentiate between different appointment types and events:

- Each resource can be given its own color in the Calendar Settings .
- All-day appointments are denoted with a triangle.
- Recurring events are denoted with a curved arrow.

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

- New - Creates a new appointment.
- Actions -
  - Add to Outlook - Click this button and select Add to Outlook to import all calendar appointments to Microsoft Outlook. Note: The ability to add your calendar to Outlook is only available in SmarterMail Enterprise and SmarterMail Free editions.
  - View -
    - Filter - Filtering appointments allows you to view all of your appointments, including ones that are recurring or all day, or to only view appointments in particular categories.
    - Overlay Calendars - When unchecked, adjusting the Resource Selectors will toggle views rather than overlaying resources to view multiple resources at one time.
    - Print - Prints the data displayed in the current calendar view.

## Viewing Calendar Event Details

When looking at your calendar in webmail, and viewing your appointments by day, week or month, only the barest details are initially displayed in order to save space. However, there may be times when you want to view more information about a specific appointment. You can do this one of two ways:

First, double clicking on an appointment will open it in a pop-up window. That pop-up window displays the full appointment details just as it does when you create a new appointment, and, if you were the original creator of the appointment, you can edit it as needed. If the appointment was created by someone else, that is denoted at the top of the pop-up window and you are not able to edit the appointment details.

Additionally, simply moving your mouse over a specific appointment in your daily, weekly or monthly view will display the details of the appointment in a call out. The call out will display the subject of the meeting as well as the time and any location data.

## Creating New Calendar Appointments

To create a new calendar appointment, click New in the content pane toolbar. This will open a new appointment window that you will use to add the appointment to SmarterMail and to invite attendees.

### Saving Appointment Details

When you add a new appointment to your calendar, you can save as much or as few details about the appointment as you like. In general, appointment details are divided into four tabbed sections:

#### Event

The event is essentially whatever you want to schedule in your calendar. It can be a lunch or dinner, a meeting, an anniversary or birthday, or virtually any other type of event you want to keep organized in your calendar. To create an Event, you will need to include the following information. Note: The Subject and Start date are the only fields required to save an appointment.

- Calendar - Use the dropdown menu to select which calendar the event is for. The default calendar can be chosen in Calendar Settings .
- Subject - The subject is the friendly name for the event you're creating.
- Attendees - Attendees are the people you want to invite to your event. When adding Attendees, each will receive an event invitation that they can either accept or reject. You will receive notifications back regardless of whether the attendee accepts or rejects the invitation. To add attendees, you can either type their email address directly or simply click the "Attendees" field name to open your list of contacts. You can select contacts from your various contact lists, including the Global Address List (GAL), as well as cycle through contacts you have listed in categories.
- Conflicts - If you add an attendee from your Global Address List, and their schedule conflicts with the date and time of your event, it will be displayed as a Conflict. To find a new day or time for the event, click on the availability icon next to the Attendees field to bring up a grid of all GAL Attendees' availability.
- Location - Where the Event will be taking place. The location can be a room or building, an address, or even some descriptive text, such as "via Webex". Regarding Room selection versus Location, these are mutually exclusive, yet compatible fields. Separating them allows for users to specify more general locations, such as a geographical location or specific office building, while still being able to reserve conference rooms at those locations.
- Room - If your domain administrator has added any shared resources, like conference rooms, the list of rooms will be available in this dropdown. Just as with attendee availability, if a conference room is already reserved for a specific day and time an Event is to be set, this information will display in the Conflicts field of the new appointment window. Conference

room availability will also show when users click the availability icon next to the Attendees field in the new appointment window.

- Start and End Dates and Times - A Start Date is required to save the event. By default, Events start as the current date and time and end 1 hour later. These fields are fully customizable.
- Availability - Here you can set your own availability - either Busy or Free. Setting your status as Busy will be reflected if others within your Global Address List try inviting you to their own events.
- Reminder - Setting a reminder will make a pop-up window appear in webmail at whatever reminder interval you set.
- Email Notification - Adding in an email address will send the event reminder to that email address based on the time interval set by the reminder.
- Private event - This setting can be used for those who share their calendar with other users. Events marked as private will only be shown to those with Full Access. Those with Availability-Only or Read-Only permission will instead see "Busy Time" and cannot view appointment details.

### **Recurrence Information**

In some cases, Events will need to occur on a regular basis. For example, weekly meetings, monthly lunches, holidays, anniversaries or business appointments. In these cases, an Event's recurrence is set. The recurrence feature is very flexible and can be as simple or as complex as necessary. Examples include a birthday that occurs every August 7th, a meeting that happens the second Monday of every month, or an appointment that occurs every four days for three weeks.

When you select the timeframe for how often the Event needs to repeat, you're presented with several options. The first is how often the Event occurs, in weeks. For example, if the Event occurs every week, you leave the recurrence at "Every 1 week(s)." If the Event happens every third week, you set the recurrence at "Every 3 week(s)," etc.

Next, you select the day of week the you want the Event to repeat on.

Finally, you set the end time for the Event recurrence. The Event can repeat indefinitely or can end after a certain number of occurrences or on a specific date.

### **Description**

Use the Description area to keep any important notes or a description of the Event. You can also include any webinar information, call in numbers, or other information you want your Attendees to see. The Event Description is passed along with the Event invitation and will appear in your Attendees' calendars and Event details.

## **Categories**

A category provides a way to organize your Events into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

## **Managing Calendar Appointments**

To view the details of an appointment, click on the appointment from any calendar view. The appointment details will load in a popup window.

### **Editing Appointment Details**

To edit the details of an appointment, click on the appointment or right-click and choose Edit from any calendar view. The appointment details will load in a popup window. To change the calendar that the appointment is assigned to, use the Move button found in the toolbar. Note: Meeting invites (appointments with attendees) cannot be moved. Make any other appropriate changes and click Save . The appointment details will update on your calendar and any attendees will receive a new invitation notifying them of the change. Note: Editing a recurring appointment will update all instances of the appointment on your calendar. There is no way to edit a single date of a recurring appointment series.

### **Deleting an Appointment**

On occasion, you may need to delete a calendar appointment. To delete and remove an appointment from your calendar, click on the appointment from any calendar view. The appointment details will load in a popup window. Click Delete . You can also right-click and choose Delete. The appointment will no longer appear on your calendar and any attendees will receive a notification that the appointment has been cancelled. Note: Deleting a recurring appointment will delete all instances of the appointment from your calendar. To delete a single instance, choose Delete Instance.

### **Deleting an Instance**

When creating an appointment, it's possible to create it as a recurring event. That means the appointment will occur at a specific interval for a specific amount of time. The most common types of recurring appointments are weekly or monthly meetings. However, there may be a time when a recurring meeting needs to be canceled due to unforeseen circumstances. That's where deleting an "instance" of a meeting comes in handy.

Deleting an instance of a recurring event allows you to delete a single meeting from a recurring sequence. That meeting can then be formally canceled or re-scheduled for a later day and time. To delete an instance, open up the meeting by double clicking on it and clicking the Delete Instance

button. You can also right-click and choose **Delete Instance** . Deleting an instance of a meeting will not affect any future or past instances - only the instance you delete.

## Tentative Appointments

SmarterMail utilizes tentative meeting requests to help prevent meeting requests or event invitations from getting lost or overlooked. 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. In addition, if a meeting or event is tentative, the reminder will still be sent if one was added to the invite!

To manage a tentative meeting request from the calendar, right-click on the appointment and choose **Accept** or **Decline** . You can also click on the appointment to load its details in a popup window. (Alternatively, you can right-click and choose **View**.) After viewing the appointment details, you can choose to **Accept** or **Decline** the meeting using the buttons found in the popup window's toolbar. Tentative meeting requests are denoted with a yellow flag in the appointment window.

Note: Users who do not wish to utilize tentative appointments can disable this functionality within their personal **Calendar Settings** .

## Tasks

### Tasks Overview

SmarterMail's robust tasks system is designed to help users keep track of anything they need to do. From shopping lists to long-term tasks, users can create lists of items, set due dates, update status and completion percentage, and even prioritize tasks. And, as there are times when an email exchange leads to a task needing to be done, email messages can be linked to tasks so that all communication surrounding the task is kept organized.

To access your tasks, click the **Tasks** icon . To view different Tasks lists (such as shared lists or mapped resources), use the **Tasks Selector** at the top of the navigation pane and select the list you want to view. Depending on your overlay settings found in the **View** menu, you can view multiple lists together or toggle between views.

For help understanding the different areas of the tasks section, see the **tasks interface diagram** .

### Navigating Your Tasks

When you view your tasks, the page is divided into two sections:

- The navigation pane displays the tasks in the list you are viewing. To view details for a specific task, simply click the desired task.
- The content pane displays all available details about the selected task.

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

- New - Creates a new task.
- Actions - Click this button and select the appropriate option to select all tasks, delete tasks, or add the tasks to Outlook.
- Select All - Selects all tasks in the list you are viewing.
- Delete - Deletes the selected task(s).
- Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes task information. Note: This feature is only available in SmarterMail Enterprise.
- View - Click this button and select the appropriate option to filter tasks, sort tasks, or choose the details that are displayed about a task in the navigation pane.
- Filter - Filters tasks by the selected category or by whether the task is completed.
- Sort - Sorts tasks by subject, due date, percentage complete, or priority level in ascending or descending order.
- Visible Fields - Choose which task details are displayed in the navigation pane.
- Overlay Tasks - When unchecked, adjusting the Tasks Selector will toggle views rather than overlaying tasks to view multiple lists at one time.

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

- Edit - Edits the selected task.
- Delete - Deletes the selected task.

## Creating New Tasks

To create a new task, click New in the navigation pane toolbar. This will open a new task window that you will use to add the task to SmarterMail.

### Saving Task Details

When you add a new task in SmarterMail, you can save as much or as few details about the task as you like. In general, task details are divided into three sections:

- Details - The details of the task include the subject of the tasks, start and end dates, and other information. Note: The subject, start date and due date are the only required fields to save a task.



- **Account** - This option is used to select the account the task should be created under. This includes the default task list and any shared resources that have been mapped to the user's account.
  - **Subject** - This is a friendly name for the task. A more detailed description of the task can be added in the next tab.
  - **Start and End Dates and Times** - The date and time the task will begin, then end. You can either manually enter the dates and times or click on the date selector icon and/or the time selector icon.
  - **Reminder** - Setting a reminder will make a pop-up window appear in webmail at whatever reminder interval you set.
  - **Priority** - Setting a priority helps you keep tasks organized by importance.
  - **Status** - The status of the task keeps you, and anyone else you may be sharing tasks with, apprised of where the task is in terms of being worked on. Options include:
    - **Not Started** - The task is created but not being worked on at the present time.
    - **In Progress** - The task is currently active and being worked on.
    - **Completed** - The task was worked on and is now finished.
    - **Canceled** - The task is not needed, is not worth starting or a decision was made to not move forward with it.
    - **% Complete** - As a task is being worked on, a user can update the status by denoting how far along the task is in terms of being marked Completed. This is a good way to keep people who share tasks apprised of where the task is in terms of completion.
    - **Description** - The description field can be used to type up the initial thoughts/ideas or goals of the task, then updated as needed with any important notes, if desired, as the task is worked on.
    - **Categories** - A category provides a way to organize your notes into manageable groups. To add a category, simply click the Master Categories button and type the new category name.
- Note: Be sure to separate categories with a comma.

Once the task is saved, it will appear on your calendar. Note: Users can disable the display of task start and end times on the calendar. For more information, see [Calendar Settings](#) .

## Searching Tasks

If you have a large number of tasks in your tasks list, finding a specific task can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find tasks quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the navigation pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the tasks list you are viewing for matches and display the results in the navigation

pane. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

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

## Notes

### Notes Overview

SmarterMail's notes feature provides users with the electronic equivalent of paper sticky notes. Use notes to jot down questions, ideas, reminders or anything else you would write on note paper. This feature is especially convenient when used to save bits of information you may need later, such as directions or text you want to reuse in other items or documents.

To access your notes, click the Notes icon . To view different Notes lists (such as shared lists or mapped resources), use the Notes Selector at the top of the navigation pane and select the Notes list you want to view. Depending on your overlay settings found in the View menu, you can view multiple lists together or toggle between views.

For help understanding the different areas of the notes section, see the notes diagram .

For help creating a new note, see [Creating New Notes](#) .

### Navigating Your Notes

When you view your notes, the page is divided into two sections:

- The navigation pane displays the notes in the list you are viewing. To view details for a specific note, simply click the desired note.
- The content pane displays all available details about the selected note.

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

- New - Creates a new note.
- Actions - Click this button and select the appropriate option to select all notes or delete notes.
- Select All - Selects all notes in the list you are viewing.
- Delete - Deletes the selected note(s).
- View - Click this button and select the appropriate option to filter notes, sort notes, or choose the details that are displayed about a note in the navigation pane.

- Filter - Filters notes by the selected category or color.
- Sort - Sorts notes by text, color, or date in ascending or descending order.
- Visible Fields - Choose which note details are displayed in the navigation pane.
- Overlay Notes - When unchecked, adjusting the Notes Selector will toggle views rather than overlaying Notes to view multiple lists at one time.

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

- Edit - Edits the selected note.
- Delete - Deletes the selected note.

## Creating New Notes

To create a new note, click New in the navigation pane toolbar. This will open a new note window that you will use to add the note to SmarterMail.

### Saving Note Details

When you add a new task in SmarterMail, you can save as much or as few details about the note as you like. In general, task details are divided into two sections:

- Details - Type the text of the note and specify the color of the note. Note colors are a great way to keep notes of specific type neatly organized. As a side note, the colors available match the colors of traditional paper sticky notes. In addition, there is a complete text editor available when creating new notes, so adding in images, screenshots, links to Web pages, highlighting text and more are available so that users can create truly dynamic and inspiring notes. Note: The color and text of the note are the only required fields to save a note.
- Categories - A category provides a way to organize your notes into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

## Searching Notes

If you have a large number of notes in your notes list, finding a specific notes can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find notes quickly and easily.

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

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

## [RSS Feeds](#)

### **RSS Feeds Overview**

Real Simple Syndication (RSS) is a way for website owners to make their content available for people to read and review. Websites publish lists of updates via "feeds" that indicate when new content is available. Rather than regularly visiting a website, you can add a new feed to SmarterMail (also called subscribing to a feed) and then see when new content is available from that site. Any new content posted to your feeds will appear in the RSS feeds section of your mailbox.

Using RSS, combined with organizing your feeds into folders, makes it easy to stay up-to-date on information from news sites, blogs, social media outlets, Google alerts, new forum topics and much more, right from within SmarterMail.

To access your RSS feeds, click the RSS feeds icon .

For help understanding the different areas of the RSS feeds section, see the [RSS feeds interface diagram](#) .

### **Navigating Your RSS Feeds**

When you view your RSS feeds, the page is divided into two sections:

- The navigation pane displays all of the RSS feeds you have added to SmarterMail. To view recent updates to a specific RSS feed, simply click the desired feed.
- The content pane displays the RSS feeds in the folder you are viewing.

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

- **Actions** - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder. Using folders makes it easy to keep your news items organized. For example, create folders for technology items, politics, business or other categories.

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


- **New** - Adds a new RSS feed to SmarterMail.
- **Edit** - Edits the selected RSS feed.
- **Delete** - Deletes the selected RSS feed(s).

## Adding New RSS Feeds

To subscribe to a new RSS feed, click New in the content pane toolbar. Adding a feed requires two pieces of information:

- Name - A friendly name for the RSS feed. Typically, you'll want to make this a short name so you can easily find it. You can use a backslash character to make the feed appear in a subdirectory, such as in News\Fox News or Technology\Microsoft Updates.
- URL - The URL for the website's RSS feed. Note: The RSS feed URL is not the same as the website URL. For example, the SmarterTools Blog can be found at [blog.smartertools.com](http://blog.smartertools.com) , but the RSS feed for the blog is at [blog.smartertools.com/rss.aspx](http://blog.smartertools.com/rss.aspx) .

## Finding a Site's RSS Feed

An RSS feed can usually be identified by an orange symbol (such as ). When you see it on a website, clicking on the icon will usually direct you to that site's RSS feed. From there, you can simply copy the link and then paste it into SmarterMail to subscribe to the feed. If the site does not have the orange RSS feed symbol, try looking for a text link to the RSS feed. Text links to feeds may include any of the following terms: subscribe, syndicate, feed, RSS, xml, or atom. Note: Not all sites offer RSS feeds.

For a list of sample RSS feeds you may be interested in subscribing to, please see [Sample Feeds](#) .

## Sample Feeds

There are many RSS feeds on the internet today. This topic contains many of the more common feeds, although this list is by no means exhaustive.

The following links are either direct RSS feed URLs or links to web pages containing an RSS feed list. To add a feed to SmarterMail, right-click on the link and select "copy shortcut" from the context menu. Then paste this value into the RSS URL in SmarterMail.

Feed lists (designated by [feed-list]) will typically have orange XML icons next to each feed. Follow the same procedure (copy shortcut) to get the URL of those feeds.

<p>News and Information</p> <ul style="list-style-type: none"> <li>• SmarterTools Blog</li> <li>• Fox News [feed-list]</li> <li>• CNN News [feed-list]</li> <li>• Yahoo! News [feed-list]</li> <li>• Reuters News Online [feed-list]</li> <li>• CNET News [feed-list]</li> <li>• Washington Post [feed-list]</li> <li>• BBC News</li> </ul> <p>Entertainment</p> <ul style="list-style-type: none"> <li>• E! Online [feed-list]</li> <li>• NY Times: Opinion</li> <li>• Dictionary word of the day</li> </ul> <p>Finance</p> <ul style="list-style-type: none"> <li>• Kiplinger Personal Finance</li> <li>• SmartMoney</li> </ul>	<p>Technology</p> <ul style="list-style-type: none"> <li>• PC Magazine: New Product Reviews</li> <li>• Slashdot News</li> <li>• TheWHIR Web Host News</li> <li>• Wired News</li> <li>• AnandTech's DailyTech News</li> </ul> <p>Sports</p> <ul style="list-style-type: none"> <li>• ESPN News</li> <li>• Fox Sports</li> <li>• CBS SportsLine [feed-list]</li> <li>• NY Times: Sports</li> </ul>
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## Managing RSS Folders

To make your RSS feeds easy to manage, SmarterMail lets users create as many RSS folders as they want. RSS folders help users organize feeds in ways that make sense to the individual user.

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

## Renaming and Deleting Folders

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

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

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

## File Storage

### File Storage Overview

SmarterMail's file storage feature allows users to upload files to the mail server and share them by sending out links to those files. Files can be public or private, can be eternal or have expiration dates and more. Note: - Uploaded files should not contain commas in the file name.

One benefit of using SmarterMail's file storage versus sending attachments is that file storage reduces the stress on the mail server by keeping large files out of the server's email spool. Another benefit of using file storage is that it allows users to send larger files without worrying about hitting any attachment size restrictions that a domain administrator, system administrator or hosting company put in place. Note: Files uploaded to the server are counted toward the user's disk space allocation, so users are encouraged to delete files that are no longer used from the server whenever possible.

To access the file storage area, click the file storage icon . By default, a list of files uploaded to the server will load in the content pane.

For help understanding the different areas of the file storage section, see the file storage interface diagram .

### Navigating File Storage

When you view your uploaded files, the page is divided into two sections:

- The navigation pane displays the folders available for managing the files that are uploaded to the server. By default, a Root Folder is created.
- The content pane displays all available files within the selected folder.

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

- Actions - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder. Using folders makes it easy to keep your uploaded files organized. For example, create folders for images, videos, business documents or other categories.

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

- Edit - Edits the sharing settings for the selected file.
- Delete - Permanently removes the selected file(s) from the server.
- Upload - Uploads a new file to the server.
- Download - Downloads the selected file(s).

## Sharing Uploaded Files

Before a file can be shared you will first need to upload it to the mail server. After uploading your file, you will need to edit the file sharing settings by selecting the file and clicking Edit in the content pane toolbar. The file sharing settings will load and the following options will be available:

- Filename - The name of the file.
- Link Expires - The date and time that the public link to download the file expires. Leave this blank and the link will never expire.
- Enabled - Select this option to enable the link expiration date.
- Access Password - The password used to download the file. Leave this blank if you don't want to password protect the link.
- Enabled - Select this option to make the file password protected.
- Enable public access - Select this option to make the file available for sharing via a public link.

When you share a file by inserting the public link to the file into an email message, the recipient will be directed to a file storage download page with instructions on how to download the file.

## Reports

### Reports Overview

Using SmarterMail's extensive reporting engine and routinely generating and evaluating reports provides users, domain administrators and system administrators with the information they need to uncover issues before they become problems, discover and evaluate trends, identify the need for policy adjustment and much more.



Users have access to a variety of reports that are directly related to their use of SmarterMail. These include disk usage and file storage usage reports in addition to a variety of traffic reports, such as IMAP usage, message traffic, POP usage and more.

Domain administrators have access to all standard user reports in addition to reports that deal directly with the domain they are managing. For example, both summary and trend reports relating to domain traffic as well as spam and virus reports.

Finally, system administrators have access to a number of system-wide reports that give a detailed overview, as well as minute detail, about the server functions like drive usage and read/write statistics, domain usage reports that can be drilled into all the way to the user level, spam and antivirus reports and more. In addition, system administrators have access to detailed security reports such as abuse detection reports and information on blacklisted/whitelisted domains.

## Summary and Trend Reports

SmarterMail includes dozens of predefined summary and trend reports and also allows users, domain administrators and/or system administrators to generate their own custom reports.

- Summary reports display summarized data at the system, domain, and user level within a user defined block of time. Summary reports are especially useful for determining the overall usage and performance of systems, domains, and users relative to each other.
- Trend reports display data points -- connected by trend lines -- for a system, domain, or user over a selected time span. Trend reports are especially useful for determining the usages and performance month-by-month, day-by-day, and hour-by-hour (etc.).

These reports can be grouped and filtered to create custom reports. With summary, trend, and custom reporting, SmarterMail provides domain and system administrators with the information they need to efficiently monitor the performance of their mail server software. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

For help understanding the different areas of the reporting section, see the reports interface diagram .

## Scheduled Email Reports

This feature is only available in SmarterMail Enterprise.
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SmarterMail Enterprise has the ability to email standard and custom reports on a daily, weekly, and monthly basis. Note: If a scheduled email report is empty of data, it will NOT be sent until there is data to actually view.

- Daily email reports are sent after 12:00 AM.
- Weekly email reports are sent after 12:00 AM Sunday.
- Monthly email reports are sent after 12:00 AM on the first day of the month.

The reports are generated and sent by SmarterMail according to the time zone configured for that particular user.

To see which reports are scheduled to be emailed, click the reports icon . Then click Scheduled Email Reports in the navigation pane and select the desired report. A list of scheduled email reports will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new scheduled email report.
- Send Now - Emails a copy of the report to the desired recipient(s).
- Edit - Edit the email options for the report.
- Delete - Permanently removes the report from the emailed reports list.

## Custom Reports

With custom reports, statistics from multiple reports can be combined to give users and administrators a comprehensive analysis of the mail server's performance, of individual mailbox performance, or an overview of a number of other metrics and measurements.

To access custom reports that were already created, click the reporting icon . Then expand the Custom Reports folder in the navigation pane. Then, select the desired report from the menu and it will load in the content pane. You can also get a list of the custom reports available by clicking on Manage Custom Reports. When you do, the custom reports that are already available will appear in the content pane. Regardless of the method you use, the following options will be available in the content pane toolbar:

- New - Creates a new custom report.
- Edit - Edit the report's settings and configuration options.
- Delete - Permanently remove the report from the custom reports list.

## Creating a Custom Report

To create a custom report, click the reporting icon . Then expand the Custom Reports folder in the navigation pane and click Manage Custom Reports and click New in the content pane toolbar. The following configuration tabs will be available:

Custom Report

Use this tab to specify the following options:

- Name - The name of the custom report.
- Default Date Range - The default time period from which report data is collected.

## Report Items

Use this tab to specify which report items to include in the custom report:

- Report Items - The specific report to be added to the custom report. Note: Depending on the report item selected, some of the options listed below may not be available.
- Name - The name of the report item.
- Rows - The number of rows displayed in the report.
- Sort By - The sort order of the data.
- Chart - To specify a specific chart type, select the appropriate option from the list.
- Values - The values that will be charted.
- Group By - The timeframe for which rows are grouped.

## Summary Reports

### Disk Reports

#### **Disk Usage Reports**

This report provides statistics regarding input/output operations of the system's hard drive, also known as "disk i/o". System administrators may use this report to correlate high disk usage on the server with SmarterMail activity and identify areas in which adjustments can be made. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Avg. Read - The average size in KB/sec of disk reads.
- Avg. Write - The average size in KB/sec of disk writes.

### Traffic Reports

#### **Disk Space Usage**

This report displays the amount of disk space currently being used by all domains on your server. Domain administrators may run this report if the domain is nearing its storage limits to identify which users are using the most disk space. System administrators may run this report to identify domains that

are utilizing the most server space. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Disk Usage - The number of MB that each folder is occupying on the server.
- Rank - The order users or domains are listed within the report.
- User - The specific user on the domain.

## File Storage Disk Space Usage

This report informs users how much disk space is currently being used for file storage. Users may use this report to identify which file storage folder is utilizing the most disk space. This is especially useful if the user is nearing his mailbox disk space limits and needs to clear up space for new data. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Disk Usage - The number of MB that each folder is taking up on the server.
- Rank - Where each folder falls in terms over overall space used.

## Message Traffic

This report will tell you the number of messages that are being sent and received by all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators may use this report for overage billing, to identify potential spammers on the server or to identify high-usage domains. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Incoming Messages - The total number of messages the account has received.
- Outgoing Messages - The total number of messages the account has sent.
- Incoming Spam Messages - The total number of spam messages delivered to the mailbox.
- Outgoing Spam Messages - The total number of spam messages sent from the account.

## Message Data

This report tells you the amount of data that was sent and received in KB by all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators may use this report to identify potential spammers on the server or to identify high-usage domains. Note: Not all reports are available for users and/or domains. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Data Sent - The total size in KB of all data sent by the account.
- Data Received - The total size in KB of all data received by the account.

## Throttle Traffic

This report shows the number of messages that have been throttled on your server for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify issues with high usage customers. For example, if a user is sending a high number of bounced messages, that is an unnecessary use of system resources that can be easily corrected. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, a specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## Throttle Violations

This report shows the number of throttle violations on your server for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify issues with high usage customers. For example, if a user is sending a high number of bounced messages, that is an unnecessary use of system resources that can be easily corrected. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, a specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## SMTP In Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP)

## SMTP In Errors

This report tells if any errors occurred from SMTP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## SMTP Out Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP outgoing mail from all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, a specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all outgoing SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP)

## SMTP Out Errors

This report tells if any errors occurred from SMTP outgoing mail from all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## POP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from POP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP)



## POP Errors

This report tells if any errors occurred from POP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## IMAP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from IMAP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP)

## IMAP Errors

This report tells if any errors occurred from IMAP incoming mail for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## Trusted Senders

This report shows the number of messages received from email addresses listed as trusted senders for all domains on your server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Messages Trusted - The total number of messages received from addresses in the trusted senders list.
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

## Spam and Virus Reports

### Incoming Spam

This report tells you the number of spam messages which were received at different tolerance levels for all users of a domain (at the domain admin level) or all domains on your server (at the system

admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Low Spam Messages - The total number of messages received with a low spam tolerance level.
- Medium Spam Messages - The total number of messages received with a medium spam tolerance level.
- High Spam Messages - The total number of messages received with a high spam tolerance level.
- Total Spam Messages - The total number of messages received with any spam tolerance level assigned to it.

## Outgoing Spam

This report tells you the number of outgoing messages that were blocked due to spam for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on a server.
- User - For domain admin, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Blocked Messages - The total number of messages that were sent and blocked as spam.

## Greylisting

This report tells you the number of connections which were allowed and delayed due to greylisting for all users of a domain (at the domain admin level) or all domains on your server (at the system admin level). Clicking on individual domains, or individual users, will display a more detailed view of each.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Rank - The order in which users or domains are listed within the report.
- Domain - For system admins, the specific domain on the server.
- User - For domain admins, the specific user on the domain.
- Account Type - For domain admins, the type of account the email address is associated with (user, domain administrator, or system administrator).
- Allowed Connections - The total number of messages that passed greylisting and were delivered to the mailbox.
- Delayed Connections - The total number of messages that were delayed due to greylisting.
- Total Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)

## Viruses

This report tells you the number of viruses which were received through email for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The day of the week covered by the report.
- Viruses - The total number of viruses detected from incoming mail.

## Trend Reports

## Traffic Reports

## Server Status

This report will tell you the amount of memory currently being used on your server. System administrators may use this report to identify issues such as spool count spikes, thread count spikes, memory spikes etc. and troubleshoot ways to correct them. For example, if the average CPU spikes, the system administrator may want to check the spam check and indexing settings. If the average memory usage spikes, the system administrator may want to check indexing and greylisting settings

and the max message size to content scan spam setting. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Avg. CPU - The average CPU usage percentage for the SmarterMail process.
- Avg. Memory - The average memory usage for the SmarterMail process.
- Avg. Nonpaged Memory - The average nonpaged memory usage for the SmarterMail process.
- Avg. Handles - The average number of handles used for the SmarterMail process.
- Avg. Threads - The average number of threads used for the SmarterMail process.
- Avg. Active Connections - The average number of active connections made by SmarterMail.
- Avg. Spool Count - The average number of messages in the spool.

## Message Traffic

This report will tell you the number of messages that are being sent and received for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators may use this report for overage billing, to identify potential spammers on the server or to identify high-usage domains. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Incoming Messages - The total number of messages the account has received.
- Outgoing Messages - The total number of messages the account has sent.
- Incoming Spam Messages - The total number of spam messages delivered to the mailbox.
- Outgoing Spam Messages - The total number of spam messages sent from the account.

## Message Data

This report tells you the amount of data which was sent and received in KB for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators may use this report to identify potential spammers on the server or to identify high-usage domains. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.

- Data Sent - The total size in KB of all data sent by the account.
- Data Received - The total size in KB of all data received by the account.

## Throttle Traffic

This report shows the number of messages that have been throttled for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify issues with high usage customers. For example, if a user is sending a high number of bounced messages, that is an unnecessary use of system resources that can be easily corrected. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## Throttle Violations

This report shows the number of throttle violations for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify issues with high usage customers. For example, if a user is sending a high number of bounced messages, that is an unnecessary use of system resources that can be easily corrected. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## Traffic By Priority

This report shows how many messages going through the spool were assigned priority levels. For example, if the system administrator set mailing lists to a lower priority than regular messages, this report can be used compare mailing list traffic and normal traffic on the server. Note: Not all reports

are available for users and/or domains. Consult your system or domain administrator for report availability.

## Bandwidth By Priority

This report shows the bandwidth for all messages in each priority level. For example, if the system administrator sets mailing lists to a lower priority than regular messages, this report can be used to compare mailing list traffic and normal traffic on the server and that bandwidth usage is occurring as expected. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

## SMTP In Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP incoming mail for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. This report can also be used to find potentially compromised reports because the administrator would see a jump in SMTP connections over time. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Avg. Active Connections - For system admins, the average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Blocked Connections - For system admins, the total number of connections that were blocked.

## SMTP In Errors

This report tells if any errors occurred from SMTP incoming mail for all domains on your server. Domain and system administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## SMTP Out Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP outgoing mail for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. This report can also be used to find potentially compromised reports because the administrator would see a jump in SMTP connections over time.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Avg. Active Connections - The average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)

## SMTP Out Errors

This report tells if any errors occurred from SMTP outgoing mail from all domains on your server.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## POP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from POP incoming mail for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify



high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Avg. Active Connections - For system admins, the average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Blocked Connections - For system admins, the total number of connections that were blocked.

## POP Errors

This report tells if any errors occurred from POP incoming mail for all domains on your server. System administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## IMAP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from IMAP incoming mail for all domains on your server. Domain and system administrators may use this report to identify high usage accounts. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Blocked Connections - The total number of connections that were blocked.
- Day - The specified amount of time that the report data falls within.

## IMAP Errors

This report tells if any errors occurred from IMAP incoming mail for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to identify users that are using faulty email clients or unnecessarily using system resources.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Blocked Connections - The total number of connections that were blocked.
- Bad Commands - The total number of bad commands given.
- Terminations - The total number of terminations that occurred for incoming mail.

## SpamAssassin Servers

This report shows general data regarding connections to external SpamAssassin servers. System administrators may use this report to identify faulty SpamAssassin servers and troubleshoot ways to correct the issue. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Avg. Active Connections - This is the average number of active connections made by SmarterMail.
- Connections - This is the total number of connections made to a SpamAssassin server.
- Failed Connections - The total number of failed connections to a SpamAssassin server.

## SMTP Out Connections

This report tells you the number of SMTP out connections made for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are

available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Avg. Active Connections - For system admins, the average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Failed Connections - The total number of connections that failed.

## ClamAV

This report tells you the number of connections your server has made to the ClamAV service. System administrators may use this report to identify and troubleshoot issues between SmarterMail and the ClamAV service. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Avg. Active Connections - The average number of active connections made to ClamAV by Smartermail.
- Connections - The total number of connections made to a particular server.
- Failed Connections - The total number of connections that failed.

## Spam and Virus Reports

### Incoming Spam Counts

This report tells you the number of spam messages which were received at different tolerance levels for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Low Spam Messages - The total number of messages received with a low spam tolerance level.

- Medium Spam Messages - The total number of messages received with a medium spam tolerance level.
- High Spam Messages - The total number of messages received with a high spam tolerance level.
- Total Spam Messages - The total number of messages received with any spam tolerance level assigned to it.

## Outgoing Spam Counts

This report tells you the number of outgoing messages that were blocked due to spam for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators can use this report to determine if the server is sending out a large amount of spam.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Blocked Messages - The total number of messages that were sent and blocked as spam. Note: The system administrator must enable outgoing spam checks or this report will not contain data.

## Incoming Spam Percentages

This report tells you the percentages of spam messages which were received at different tolerance levels for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). System administrators may use this report to adjust spam weight settings. For example, if the system administrator notices a large percentage of medium spam messages, it is highly likely that these messages actually are spam. For this reason, the system administrator may want to adjust the spam weights so that many of these messages will be marked as a high spam tolerance level in the future. Doing so may decrease the amount of spam delivered to users' inboxes. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Low Spam Percentage - The total percentage of spam messages received with a low spam tolerance level.
- Medium Spam Percentage - The total percentage of spam messages received with a medium spam tolerance level.
- High Spam Percentage - The total percentage of spam messages received with a high spam

tolerance level. **Total Spam Percentage** - The total percentage of spam messages received with any spam tolerance level assigned to it.

## Outgoing Spam Percentages

This report tells you the percentage of outgoing messages that were blocked as spam for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- **Day** - The specified amount of time that the report data falls within.
- **Blocked Messages** - The total percentage of outgoing messages that were sent and blocked as spam.

## Greylisting

This report tells you the number of connections which were allowed and delayed due to greylisting for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Domain and system administrators may use this report to verify that greylisting is working.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- **Day** - The specified amount of time that the report data falls within.
- **Allowed Connections** - The total number of messages that passed greylisting and were delivered to the mailbox without delay.
- **Delayed Connections** - The total number of messages that were delayed due to greylisting.
- **Total Connections** - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)

## Viruses

This report tells you the number of viruses which were received through email for a specific domain (at the domain admin level) or all domains on your server (at the system admin level). Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Viruses - The total number of viruses that were detected from incoming mail.

## Cyren Premium Antispam

This report tells you the number of messages that the Cyren Detection Center classified as potential spam on your server. System administrators may use this report to verify that the Cyren Premium Antispam add-on is working, to gauge the amount of spam coming into the server and more. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Confirmed - The number of messages the Cyren Detection Center confirmed as coming from known spam sources.
- Suspected - The number of messages the Cyren Detection Center suspected might be spam because they were sent to a slightly larger than average distribution.
- Bulk - The number of messages the Cyren Detection Center deemed as sent in bulk. Note: Newsletters or mailing list messages may be included in this classification.
- Not Spam - The number of messages the Cyren Detection Center deemed were not spam.

## Cyren Zero-hour Antivirus

This report tells you the number of incoming messages that the Cyren Detection Center flagged as containing potential viruses. System administrators may use this report to verify that the Cyren Zero-hour Antivirus add-on is working, the number of viruses coming into the server and more. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Virus Result - The number of messages in which the Cyren Detection Center confirmed they contained a virus.
- High Result - The number of messages the Cyren Detection Center deemed have a high likelihood of presenting a virus threat.
- Medium Result - The number of messages in which the Cyren Detection Center found a probable threat of viruses.
- Non-virus Result - The number of messages the Cyren Detection Center confirmed did not

contain viruses.

- Unknown Result - The number of messages in which the Cyren Detection Center could not determine the threat for viruses.

## Message Sniffer

This report tells you the number of messages that Message Sniffer classified as potential spam on your server. System administrators may use this report to verify that the Message Sniffer add-on is working, to gauge the amount of spam coming into the server and more. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Confirmed - The number of messages Message Sniffer confirmed as coming from known spam sources.
- Not Spam - The number of messages Message Sniffer deemed were not spam.

## Security Reports

### Abuse Detection

This report shows the number of attacks on the server. For example, if a system administrator notices an increase in DOS or harvesting violations, he may review server logs to determine the IP address that is triggering the violations and consider permanently blocking the IP. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The day of the week covered by the report.
- DOS Violations - The total number of DOS violations.
- Harvesting Violations - The total number of harvesting violations.
- Internal Spammer Violations - The total number of spam violations from users on the SmarterMail server.

### Blacklist / Whitelist

This report shows the number of connections made from blacklisted and whitelisted IPs. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Day - The day of the week covered by the report.
- Blacklisted Connections - The number of connections SmarterMail made to blacklisted IPs.
- Whitelisted Connections - The number of connections SmarterMail made to whitelisted IPs.

## Events

### 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.

## Creating New Events

To add a new event, click the settings icon . For user-level events, expand the My Settings folder and click Events in the navigation pane. Then click New in the content pane toolbar. The new event settings will load in the content pane.

## Saving Event Details

When you add a new event, event details are divided into two sections: options and actions.

### Options

Use this section to specify the following event options:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Domain - The domain name the event was created for.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Enabled - Checkmark this selection to enable the event. This can be used to temporarily disable events.

Depending on the event category and type selected, different event action criteria will be available.

For more information on the various event action criterions, see the corresponding event category page of the online help.

### Actions

Use this section to specify the following event actions:

- Action - The actions that occur when an event is triggered (or how the system notifies you).
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list.
- Notification Profile - To specify which notification profile to use, select the appropriate option from the list.
- From Address - The email address the system uses to send the event notification

Subject, Short Body, and Body will all be populated by the system using the variables listed.

Additional fields may be available depending on the event category chosen.

Click the Save button in the actions popup window and then click Save in the content pane toolbar to save that event.

## 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.

## Event Categories

### Alias Events

System administrators can receive notifications based on the following alias events:

- Alias Added - Notifies system administrators when a user creates a new email alias.
- Alias Deleted - Notifies system administrators when a user deletes an existing email alias.

### Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Domain - The domain on which the event occurs.
- Time of Day - The time frame during which the event occurs.

- Day of Week - The day(s) of the week during which the event occurs.
- Alias Name - The alias name that will trigger the event.
- Alias Addresses - The alias address that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Use notification profile
- Send email
- Toast notification
- Execute command-line

## Collaboration Events

Users and system administrators can receive notifications based on the following collaboration events:

- Calendar Reminder Occured - Notifies users that there is an upcoming appointment.
- Task Reminder Occured - Notifies users that a task deadline is approaching.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Domain - The domain on which the event occurs.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Subject - The words that will trigger the event if found within the appointment or task subject.
- Location - The appointment location that will trigger the event.
- Description - The words that will trigger the event if found within the appointment or task description.
- Email Address - The email address that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Use default notification profile for user
- Use my notification profile
- Send email
- Toast notification
- Execute command-line

## Domain Events

### Conditions

System administrators can receive notifications based on the following domain events:

- Domain Added - Notifies system administrators when a new domain is added to the server.
- Domain Deleted - Notifies system administrators when an existing domain is deleted from the server.
- Domain Disk Space Used - Notifies system administrators when a domain's disk space usage reaches a certain threshold.

### Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Domain - The domain on which the event occurs.
- Domain Usage (%) - The percentage of disk space utilization that will trigger the event.
- Domain Usage (MB) - The disk space utilization in MB that will trigger the event.
- Domains Used - The number of domains that will trigger this event.
- Domains User (%) - The percentage of the total number of domains allowed that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

### Actions

Depending on the event selected, the following actions are available:

- Use my notification profile
- Send email

- Toast notification
- Execute command-line

## Email Events

Users and system administrators can receive notifications based on the following email events:

- Message Received - Notifies users that they received a new email message.
- Message Sent - Notifies users that the mail server sent a message.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- To Address - The email address to which the message was sent.
- To Domain - The domain the email was sent to or received from that will trigger the on which the event.
- From Address - The email address from which the email message was sent.
- From Domain - The domain from which the email message was sent.
- Subject - The words that will trigger the event if found within the subject of the message.
- Intra Domain - Select this option to trigger the event when an email is sent/received from within the domain.
- Size - The message size in KB that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Use my notification profile
- Send email
- Toast notification
- Execute command-line

## Mailing List Events

System administrators can receive notifications based on the following mailing list events:

- Mailing List Added - Notifies system administrators when a new mailing list is created.
- Mailing List Bounce Removal - Notifies system administrators when an email address is removed from the mailing list due to bounced messages.
- Mailing List Deleted - Notifies system administrators when an existing mailing list is deleted.
- Mailing List Subscribe - Notifies system administrators when an email address subscribes to a mailing list.
- Mailing List Unsubscribe - Notifies system administrators when an email address unsubscribes from a mailing list.
- Message Sent to Mailing List - Notifies system administrators when a new message is sent to the mailing list.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Domain - The domain on which the event occurs.
- Email Address - The email address that will trigger the event.
- From Address - The email address from which the message is sent to the mailing list.
- List Name - The mailing list name that will trigger the event.
- Subscribe Method - The subscription signup method that will trigger the event.
- Unsubscribe Method - The subscription removal method that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Use my notification profile
- Send email

- Toast notification
- Execute command-line

## Security Events

System administrators can receive notifications based on the following security events:

- Abuse Detection Rule Triggered - Notifies system administrators when an abuse detection rule has been triggered.
- ClamAV Failure - Notifies system administrators when there has been a failure with the ClamAV service.
- Blacklist Status Changed - Notifies system administrators when there has been a change in the automatic blacklist check of a particular mail server IP. This can be triggered when a server's blocked status is set to True or False. (Added or removed.)
- Outgoing Message Blocked - Notifies system administrators when an outgoing message is blocked.
- SpamAssassin Failure - Notifies system administrators when there has been a failure with the SpamAssassin service.
- Virus Found - Notifies system administrator if a virus is found on the server.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- ClamAV IP - The IP address of the ClamAV server that will trigger the event.
- ClamAV Port - The port of the ClamAV server that will trigger the event.
- Consecutive Failures - The number of consecutive failures that will trigger the event.
- File Name - The file name that will trigger the event.
- File Size - The size of the file in KB that will trigger the event.
- Name - The full name of the person that will trigger the event.
- IP Address - The IP address that will trigger the event.
- Rule Name - The rule name that will trigger the event.
- Rule Type - The type of security rule that will trigger the event.
- Spam Weight - The spam weight of the message that will trigger the event.
- SpamAssassin IP - The IP address of the SpamAssassin server that will trigger the event.



- SpamAssassin Port - The port of the SpamAssassin server that will trigger the event.
- Subject - The words that will trigger the event if found within the subject of the message.
- To Address - The email address to which the message was sent.
- From Address - The email address from what the message was sent.
- Virus Name - The virus name that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

## System Events

System administrators can receive notifications based on the following system events:

- Add-on Expiration - Notifies system administrators when a paid add-on, like Exchange ActiveSync, is expiring soon.
- Disk Availability - Notifies system administrators when a disk drive is nearly full.
- Gateway Failure - Notifies system administrators when a gateway server has failed.
- License Expiration - Notifies system administrators when a license is about to expire.
- Memory - Notifies system administrators when a domain's or user's memory usage reaches a certain threshold.
- New Version Available - Notifies system administrators when a new version of the product is available.
- Service Started - Notifies system administrators when a new service is started.
- Service Stopped - Notifies system administrators when a service is stopped.
- Spool Count - Notifies system administrators when the spool count reaches a certain level.
- System Settings Changed - Notifies system administrators when any settings have been changed.
- System Uptime - Notifies system administrators when the uptime for the system reaches a certain point.
- Threads - Notifies system administrators when the thread count reaches a certain level.
- Upgrade Protection Reminder - Notifies system administrators when the upgrade protection for their SmarterMail license is expiring.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Days Left - The number of remaining days that will trigger the event.
- Add-on Name - The add-on that is going to expire.
- Disk Drive - The drive letter to monitor.
- Disk Usage (GB) - The drive usage limitation, in gigabytes, that will trigger the event.
- Disk Usage (%) - The drive usage limitation, as percentage of space, that will trigger the event.
- Free Disk Space (GB) - The free space limitation, in gigabytes, that will trigger the event.
- Free Disk Space (%) - The free space limitation, as percentage of available space, that will trigger the event.
- Gateway Address - The address of the gateway that will trigger the event.
- Memory Used (%) - The percentage of memory used that will trigger the event.
- Memory Used (MB) - The amount of memory used in MB that will trigger the event.
- Service - The service that will trigger the event.
- Spool Count - The number of messages in the spool that will trigger the event.
- Thread Count - The number of threads that will trigger the event.
- Uptime (Days) - The number of days the system has been running that will trigger the event.
- Version - The version that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Toast notification
- Use my notification profile

## Throttling Events

System administrators can receive notifications based on the following throttling events:

- Domain Throttled - Notifies system administrators when a domain reaches the throttling threshold.
- User Throttled - Notifies system administrators when a license is about to expire.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Domain - The domain on which the event occurs.
- Rejected - With throttling you can choose to delay or reject messages in the spool after the throttling threshold is hit. So if a domain is set to allow 500 messages per hour before throttling and the action is set to reject, those emails will get deleted instead of just being delayed for later delivery. If you have it set to delay, those messages stay in the spool and 500 more will send out in the next hour.
- From Address - The email address from which the message is sent.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile
- Toast notification

## User Events

Users and system administrators can receive notifications based on the following user events:

- User Added - Notifies system administrators when a new user is added.
- User Changed Forward - Notifies system administrators when a user adds a forwarding

address or modifies an existing forwarding address.

- User Changed Password - Notifies system administrators when a user changes their password.
- User Deleted - Notifies system administrators when an existing user is deleted.
- User Disk Space Used - Notifies users when the mailbox space utilization reaches a certain threshold.

## Conditions

Depending on the event selected, the following event criteria are available:

- Event Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - Each category has several specific event types that can trigger the action.
- Time of Day - The time frame during which the event occurs.
- Day of Week - The day(s) of the week during which the event occurs.
- Domain - The domain on which the event occurs.
- Full Name - The full name of the person that will trigger the event.
- Mailbox Usage (%) - The percentage of mailbox space utilization that will trigger the event.
- Mailbox Usage (MB) - The mailbox space utilization in MB that will trigger the event.
- Username - The username that will trigger the event.
- Enabled - The Enabled checkbox must be marked in order for this event to trigger. Use this setting to temporarily disable events.

## Actions

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

## 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.
- Mark messages sent to junk as read - Select this option to mark messages as read on the server

when marked as spam.

- Show HTML hyperlinks when printing - Select this option to add link URLs in parenthesis to the right of the hyperlinks when printing email messages.

## 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(es) to which messages will be forwarded. Separate multiple email addresses with a semi-colon or comma.
- 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, Dropbox or OneDrive to your mailbox so that you can share links to files stored in your cloud 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 and tablets and Outlook 2015.
- Exchange Web Services is an optional add-on that seamlessly syncs SmarterMail messages, contacts, calendars and tasks to third-party email clients that support the protocol, including Microsoft Outlook 2015 for Mac from Office 365, Microsoft Outlook 2011 for Mac, Apple Mail, the Outlook client for iPad and eM Client.
- 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.

## 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.

## **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. Note: If you select a filter or action that requires an value to be entered and the field is left blank, SmarterMail will ignore this rule.

### Step 2 - Filter Type and Criteria Details

Choose whether this filter uses the "And" modifier, meaning it requires all criterion to be met from each and every section, or the "Or" modifier, meaning just one or more 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" or the yesbox to no.

### 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 address)
- Spam probability
- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated

## 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.

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 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.

## Domain Settings

### General Settings

This settings page is only available to domain administrators.
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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.

#### Login Display

Small businesses using SmarterMail on their own servers, or even companies using SmarterMail from their hosting provider, will benefit from the ability to customize the SmarterMail login page to add a company logo, provide additional branding text, or simply adjust the default  Login to SmarterMail  text to be more in line with an overall brand message. Note: This tab will only be visible if the system administrator has enabled Login Display Customization for the domain. Furthermore, if the system administrator allows a domain to override the custom login display and the domain administrator does

not enable customization for their domain, users will see the default SmarterMail login screen, regardless of whether the system administrator has enabled a custom login display for the system.

Use this tab to adjust the SmarterMail login display settings:

- Custom Help URL - Entering a full URL in this field will add a custom button to the Help menu that users can access in the SmarterMail interface. Administrators can link to a variety of things, including server-specific instructions for syncing, help resources, contact information, etc.
- Enabled - Check this box to enable the custom help URL in the Help menu.
- Custom Help Text - The hyperlink text for the custom URL in the Help menu.
- Custom Login Text - Use this field to adjust the default "Log into SmarterMail" text with something more in line with an overall brand message.
- Enabled - Check this box to enable the Custom Login Text.
- Company Logo - Click on Choose File to upload a company logo. Uploading a logo using this upload control will host the image publicly on the server and enter the `` tag in the HTML section. Note: Uploading an image here alone will NOT display the image on the login screen. The HTML must be entered in the Login Page HTML section. This upload control can be used by those who don't have their logo publicly hosted or who wish the image source to point back to their mail server. Furthermore, regardless of the image uploaded, the image's source URL will remain the same; only one image may be hosted at a time.
- Enable custom login page HTML - Check this box to enable the ability to use HTML to further modify the login screen to add additional text or adjust the layout. This is used in conjunction with the Login Page HTML section below.
- Login Page HTML - Enter the custom HTML that will be used to further modify the login screen (in-line custom CSS can be used as well). Note: To include white space around the company logo, the div id "companyinfo" must be included. In addition, domain administrators cannot enter scripts as this is considered to be unsafe code. System administrators do not have this limitation.

The following options are available in the content pane toolbar:

- Save - Saves the custom login display settings.
- Preview - Opens a new popup window displaying what the current settings render on the login screen. If this window remains open, live changes can be seen as settings are adjusted.

## 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:

- Show calendar availability for all users in domain - 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 similar 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 tabs listed below will be available. Note: When editing a user's settings, use the Rename button in the content pane toolbar to change the username.

### 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`.
- Temporary Password - Note: Only System Administrators managing/impersonating the domain will see this option. This option allows System Administrators to create an additional, temporary password in order to troubleshoot account issues. A user's actual password will never be shown in the Web interface. Creating a temporary password, rather than impersonating the account, may be required when it's necessary to log into a user's email or IM client where impersonation is not available. In addition, administrators will find that some behavior in webmail may be slightly different depending if an account is impersonated or logged in

directly. For example, when you impersonate a user, the Domain Admin's settings always show, even if you're impersonating a user that isn't a Domain Admin. For a clear idea of the options available to the user, an administrator may wish to log in directly instead. Clicking Manage will open a modal window where the temporary password can be generated. Only one temporary password may be created at a time, and on creation, will be available for 24 hours. Extend the time remaining or revoke the password by clicking on Manage again in the user settings and choosing the corresponding button. Choosing to extend the password will add 24 more hours to the remaining time. Note: Creating and using a temporary password does not disable the user's standard account password or impact their ability to log in or access webmail.

- **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. Note: This feature is not displayed if SmarterMail is used as the Authentication Mode .
- **Password** - The password for the user to login to Smartermail. Note: This feature is not displayed if Active Directory is used as the Authentication Mode.
- **Confirm Password** - The password confirmation for the user to login to Smartermail. Note: 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 .
- Enable domain administrator access - Select this option to allow the user to edit domain settings.
- Disable password changes - Select this option to prevent the user from changing the login password. This setting overrides the password expiration found in Security settings. A user's password will not expire or be required to be changed if this setting is enabled.
- Enable ActiveSync - Select this option to add Exchange ActiveSync to a mailbox.
- 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.
- Enable SMTP Accounts - Select this option to allow users to send email from a third-party mail server account right from within SmarterMail. For example, if a user has a second email address that they regularly use, enabling this option would allow the user to set up an SMTP Account for that address and choose which account to send from when composing new messages.
- 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. Note: This setting will only be visible if

greylisting has been enabled for the server.

- Enable outgoing mail signing - Selecting this option means outgoing messages will be signed via DKIM.

## 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 in order.
- Delete Action - To specify the action performed on deleted messages, select the appropriate action from the list.
- Move to Deleted Items folder - Deleted items will appear in the deleted items folder, which will need to regularly be emptied.
- Auto Purge Folder - Permanently deletes the message. Note: When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.
- Mark as deleted - Flags the message for deletion, but it will not be removed until the folder is purged.
- Mark as deleted and hide - Flags the message for deletion and hides it from view, but it will not be removed until the folder is purged. Note: Be careful to monitor your disk space usage when using this option, as it may fill up with what appears to be a small number of messages.
- 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 popup window - 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.
- Mark messages downloaded by POP3 as read - Select this option to mark messages as read on the server when downloaded in the client by POP3.
- Mark messages sent to junk as read - Select this option to mark messages as read on the server when marked as spam.
- Show HTML hyperlinks when printing - Select this option to add link URLs in parenthesis to the right of the hyperlinks when printing email messages.

## 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.
- Compose Font - To specify the default font and font size for emails, select the appropriate option from the list.
- Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list. 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.
- Compose Format - To specify whether new messages are composed in HTML or plain text, select the appropriate option from the list.
- 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(es) to which messages will be forwarded. Separate multiple email addresses with a semi-colon or comma.
- 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 user per hour. By default, the number of outgoing messages is 1,000.
- 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:

- **Alias 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 user(s) who should receive the messages sent to this alias.
- **Include all domain users** - Select this option to include all domain users automatically in the alias. Note: This option does not override the email addresses listed in the Email Address box. If selected, all domain users will be included in addition to the users entered in the Email Address box.
- **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 well as when using third-party chat clients.
- **Show in Global Address List** - Select this to display the alias in the Global Address List.
- **Internal only** - Select this option to only allow emails to be received from addresses within the alias's domain.

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.
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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.
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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.

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.

## ActiveSync Mailboxes

This feature is only available in SmarterMail Enterprise.

Microsoft Exchange ActiveSync (EAS) is the industry standard for synchronizing email clients and mobile devices with email servers such as SmarterMail. Using EAS you can synchronize email, contacts and calendars with a number of email clients such as Microsoft Outlook 2013 as well as with smartphones, tablets and "phablets" from Apple, HTC, Samsung and others.

System administrators will use this section to enable and disable the EAS add-on for mailboxes across all domains on the SmarterMail server. Domain administrators will use this page to manage the EAS add-on for their particular domain. Note: Before an administrator can configure a mailbox to sync using ActiveSync, the add-on needs to be activated and available for users of the domain. For more information, please refer to the KB article [Activate Microsoft Exchange ActiveSync](#) . Furthermore, domain administrators will only see this section available when the system administrator has enabled ActiveSync User Management for their domain.

To access this section as the System Administrator, click the Settings icon and click ActiveSync Mailboxes in the navigation pane. To access this section as the Domain Administrator, click the Settings icon , expand the Domain Settings folder and click ActiveSync Mailboxes in the navigation

pane. A list of accounts for which the Exchange ActiveSync add-on is enabled will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple mailboxes. Mailboxes must be selected before choosing an action from the actions toolbar.
- **Email Address** - The email address of the SmarterMail user.
- **Display Name** - The display name of the SmarterMail user.

The following options are available from the actions toolbar:

- **Add** - Adds Exchange ActiveSync to a mailbox on the domain.
- **Delete** - Removes Exchange ActiveSync from the selected mailbox.

## **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.
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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.

## **Variables**

Mailing Lists support the use of the following variables. These can be used in the body or subject line of emails that are sent to the mailing list subscribers and also in the footer, header and subscriber System Messages . Though similar to Subscriber Fields in format, these variables need no additional configuration. Simply enter the variable below to display its associated information. Variables will always follow this format: #Variable#

- **#UnsubscribeLink#** - An unsubscribe variable is included to allow users to unsubscribe from the mailing list with a URL. Note: This URL can also be given friendly hyperlink text (rather than linking the URL) by modifying the Friendly Unsubscribe setting when configuring or modifying a mailing list. For more information, see [Creating a New Mailing List](#) .
- **#Recipient#** - The email address of the subscriber who was sent the message.
- **#Sender#** - The email address of the user sending the message.
- **#DomainDateNow#** - The current date (in shorthand) according to the domain's new user time zone defaults found in User Defaults. Ex: 07/13/2015.
- **#DomainTimeNow#** - The current time according to the domain's new user time zone defaults found in User Defaults. Displayed in 24-hour format.
- **#DomainDateTimeNow#** - The current date and time according to the domain's new user time zone defaults found in User Defaults. Displayed in shorthand and 24-hour format.
- **#DomainDayNow#** - The current date (date alone, without month and year) according to the domain's new user time zone defaults found in User Defaults. Ex: 13.
- **#DomainMonthNow#** - The current month (in numeric value) according to the domain's new user time zone defaults found in User Defaults. Ex: 07.
- **#DomainYearNow#** - The current year according to the domain's new user time zone defaults found in User Defaults. Ex: 2015.
- **#DomainDayNameNow#** - The current day of the week according to the domain's new user time zone defaults found in User Defaults. Ex: Monday.
- **#DomainMonthNameNow#** - The current month (by its name) according to the domain's new user time zone defaults found in User Defaults. Ex: July.
- **#ModeratorDateNow#** - The current date (in shorthand) according to the Moderator's time zone. Ex: 07/13/2015.
- **#ModeratorTimeNow#** - The current time according to the Moderator's time zone. Displayed in 24-hour format.
- **#ModeratorDateTimeNow#** - The current date and time according to the Moderator's time zone. Displayed in shorthand and 24-hour format.

- #ModeratorDayNow# - The current date (date alone, without month and year) according to the Moderator's time zone. Ex: 13.
- #ModeratorMonthNow# - The current month (in numeric value) according to the Moderator's time zone. Ex: 07.
- #ModeratorYearNow# - The current year according to the Moderator's time zone. Ex: 2015.
- #ModeratorDayNameNow# - The current day of the week according to the Moderator's time zone. Ex: Monday.
- #ModeratorMonthNameNow# - The current month (by its name) according to the Moderator's time zone. Ex: July.
- #ServerDateNow# - The current date (in shorthand) according to the server's system time zone. Ex: 07/13/2015.
- #ServerTimeNow# - The current time according to the server's system time zone. Displayed in 24-hour format.
- #ServerDateTimeNow# - The current date and time according to the server's system time zone. Displayed in shorthand and 24-hour format.
- #ServerDayNow# - The current date (date alone, without month and year) according to the server's system time zone. Ex: 13.
- #ServerMonthNow# - The current month (in numeric value) according to the server's system time zone. Ex: 07.
- #ServerYearNow# - The current year according to the server's system time zone. Ex: 2015.
- #ServerDayNameNow# - The current day of the week according to the server's system time zone. Ex: Monday.
- #ServerMonthNameNow# - The current month (by its name) according to the server's system time zone. Ex: July.

## 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.

- Friendly Unsubscribe - The text entered here will be hyperlinked when using the Unsubscribe variable . Without this setting enabled, the unsubscribe link will hyperlink the full URL.
- Enabled - Check this box to enable the friendly text for the unsubscribe URL.
- 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. For more information on variables, see Mailing Lists .

## **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.
- **faildtosetdigestmode** - 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.
- **listoflists** - LISTSERV COMMAND ONLY. This reutrns a list of the mailing lists for a particular domain. This requires the LIST command to be set.

- `maxmessageizeexceededemail` - 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 subscribers. Subscribers 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. At a bare minimum, the .csv file must contain a column named

"EmailAddress". Any additional columns in the .csv file will be added to the Subscriber Fields for the corresponding subscriber/email address. See example below:

- 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. For example, if you'd like your messages to be sent out with the subscriber's first name in the message greeting (ex. "Hello John,"), you'd first create the Subscriber Field then add it to each subscriber. To create or manage Subscriber Fields, click the Settings icon . Then expand the Domain Settings and Mailing Lists folders and click Subscriber Fields in the navigation pane.

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

- New - Adds a new Subscriber Field
- Edit - Allows changes to be made to the selected Subscriber Field.
- Delete - Remove the selected Subscriber Field(s).

### Adding a New Subscriber Field

To add a new Subscriber Field, click the New button. A modal window will display the following options:

- Name - The name of the Subscriber Field. Note: The text entered here is used as the variable when sending subscriber fields in mailing list messages.

- Default Value - Enter the text that should be automatically entered for current subscribers.

Once the field is created, subscribers can be individually modified to change the value. Note: If a default value is not included, and the subscriber does not have their field configured, the variable will be removed from the message, leaving a blank space in its location.

## Using Subscriber Fields in Messages

A Subscriber Field can be used in mailing list messages as a type of custom variable. To enter Subscriber Fields as variables, the name of the field must be enclosed with a #. For example, if a Subscriber Field was created for "Customer Name", you would enter #Customer Name# in your message.

## 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 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 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.
- TXT Record Name - After entering a unique identifier in the Selector field, selecting the Key Size and clicking Generate Key in the content pane toolbar, the TXT Record Name will populate. Set up the TXT Record in DNS using this name.
- TXT Record Value - After entering a unique identifier in the Selector field, selecting the Key Size and clicking Generate Key in the content pane toolbar, the TXT Record Value will populate. Set up the TXT Record in DNS with this value.

### 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. Note: List only one header field per line break.

## 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.

Note: LDAP integration will only function if SmarterMail is on the same domain as the LDAP server you are trying to connect to.

## 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 .

# [Advanced Search](#)

## Advanced Search Overview

SmarterMail users can take advantage of the mail server's powerful search feature to search specific sections of their mailbox (everywhere, email, contacts, or calendars). Search results are then displayed by the type of result (email, contacts, or appointments), making it easy to find the information you are looking for.

To access the advanced search feature, click the advanced search icon .

For help understanding the different areas of the advanced search section, see the advanced search diagram .

## Performing Advanced Searches

To select which section of the mailbox to search, click the search selector and select the appropriate option from the list. In general, users can search everywhere, their email, contacts, or calendars.

Then type the search criteria in the search bar located near the top of the navigation pane and click the Search button. SmarterMail will automatically search for matches and display the results in the content pane. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

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

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Reset - Clears the search box and any previous search results that may be displayed in the content pane.

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

- Open - Opens the selected email, contact, or appointment item.
- Delete - Permanently deletes the selected email, contact, or appointment item.

Note: Users can also narrow the search locations by specifying search criteria. For example, if a user performing a search of his email can click Add Criteria and select From to ensure SmarterMail only returns results that have the search text in the From field.

## **[Additional Help Topics](#)**

### **Mailing Lists**

Generally, users do not have the ability to manage mailing lists. However, the domain administrator may assign an user as the moderator of a specific mailing list. If a user is the moderator of a mailing list, the user will be able to create new mailing list messages from his inbox. In addition, the user will have access to the mailing list settings for which he is a moderator. For more information, see [Mailing Lists Overview](#) .

### **Plus Addressing**

Plus Addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first.

#### **Example 1**

Assume your email address is `myname@example.com`, and you want to sign up for a newsletter called ACME News. Furthermore, you want that newsletter to go to a folder in your email called "ACME". Assuming you have plus addressing enabled, all you have to do is sign up for the newsletter with the plus address `myname+ACME@example.com` Note: When writing the plus address, make sure the folder name is listed after the username but before the `@example.com`.

When the newsletter gets delivered to your email, it will automatically be placed in an ACME folder, which will be created automatically if it does not already exist. No additional steps are required. The whole process is automatic once you enable the feature.

#### **Example 2**

If you include the "/" character in your plus address, you can automatically create sub-folders. For example, the plus address `myname+Newsletters/ACME@example.com` will create a folder called Newsletters, then create an ACME folder under it, and drop the newsletter into the ACME folder.

As an added bonus, you can connect to folders in your email using POP3 by using plus addressed emails. The example above, when input into your POP email client as your login name, will return the contents of that folder.

### **Enabling Plus Addressing**

For step-by-step instructions on enabling plus addressing, please refer to the KB article [How To Enable Plus Addressing](#) .

## Listserv commands

Listserv commands allow you to control the list through commands sent in email messages to the listserv command address. By default, the command address for a domain is "STServ@example.com", where example is the name of your domain. However, your system administrator may change this command address.

To send a command, compose an email to the command address with the command in the body of the message. The subject of the message is ignored.

### Available Commands

Note: Any references to listname should be replaced with the list you are trying to use.

Help listname - Replies to the email with the contents of the Help system message for that list.

List - Replies to the email with a list of all available lists.

List listname - Replies to the email with a list of all subscribers for a particular list. Note: This command can be disabled by the domain administrator.

Subscribe listname - Adds your email address to the subscribers list of the mailing list. Note: This command can be disabled by the domain administrator.

Unsubscribe listname - Removes your email address from the subscribers list for the mailing list referenced by listname.

Set mode digest listname - Sets your email address to receive emails in digest mode, which will send all messages for the list combined into one email at regular intervals.

Set mode standard listname - Sets your email address to receive emails in standard mode (the default), which will send messages one at a time to your email account.

## Using a Catch-All

This feature is only available to domain administrators.

A catch-all alias can be established that can receive all incoming email that goes to invalid email addresses within your domain. You may want to do this, for example, if customers frequently send to accounts that do not really exist. In general, however, use of a catch-all alias is not recommended, as it makes you more prone to harvesting attacks.

For information on setting up and assigning a catch-all alias, refer to the KB article [How To Enable or Disable Catch-alls](#).

Note: It is important to never set an auto-responder on an email account that the catch-all forwards to, as it may result in spammers sending more email to your domain. In addition, an increase in bandwidth usage will result. If you do not see the option for adding a catch-all, please contact your system administrator as they may have disabled the option.