



# SmarterMail 16.x

Help Documentation

## SmarterMail Help

Welcome to the SmarterMail Help System. In the tree menu on the left you will find various help topics that will help you use SmarterMail more effectively. At the top of each page, there are links that will allow you to search the help, watch product videos, visit the SmarterTools Community, browse the knowledge base or either print the page you're on or view the page as a PDF file. At the bottom of each content window, there is also a "Link to this page" text link that can be used for to send people directly to that page of the help file.

If you need assistance beyond what's available in this documentation, feel free to review the paid support options and self-help resources found on the Support Portal .

### Common Help Topics for Users

- Logging in to my email account
- Sending messages
- Reading messages

### Common Help Topics for Domain Administrators

- Adding email accounts
- Adding email aliases
- Add shared resources (shared calendars, conference rooms, etc.)
- Configuring spam filtering

### Common Help Topics for System Administrators

- Logging in for the first time
- Adding a domain
- Proper DNS configuration
- Locking down your server

## Getting Started

SmarterMail is a feature-rich Windows mail server that brings the power of enterprise-level features and collaboration to businesses and hosting environments. Use the Getting Started section of the SmarterMail Online Help as a quick resource to help you set up the application.

Note: This section assumes you have already downloaded and installed SmarterMail from the SmarterTools website.

### Welcome to SmarterMail

Once you've installed SmarterMail, you're presented with the setup page. Here, you set up a few small details before you're taken directly into SmarterMail, where you start adding your domains and truly managing your new SmarterMail server.

#### License Key and Administrator Account

- **Product Activation** - Here, you enter your license key (or a trial key) to activate either the Professional or Enterprise edition of SmarterMail. If you choose not to provide a license key, the product will run as the Free edition. For more information, see [Activation](#) .
- **Primary Administrator** - This initial system administrator account will be used to manage your entire SmarterMail installation. Enter a username and password. If needed, additional administrative accounts can be added AFTER this initial, primary system admin account is created. For more information, see [System Administrators](#) .

#### System Info

This is where you provide the information SmarterMail -- or ANY email server -- requires in order to identify itself when sending email messages to other mail servers. This includes:

- **Hostname: THIS IS REQUIRED.** The primary name of your mail server, which should be a fully qualified domain name complete with reverse DNS entry. It IS possible to use DNS Server addresses to override system defaults.
- **Primary/Secondary DNS Server IPs** - These are optional.
- **Bound IP Addresses:** The IP addresses you want to bind SmarterMail to. These can be changed later, if need be.

#### SmarterMail Paths

Finally, you'll want to specify where SmarterMail stores configuration and mailbox information. This includes domain data, where the Spool resides, where log files are stored and more. By default, SmarterMail sets paths for you on the local drive. However, if you want to store information on a

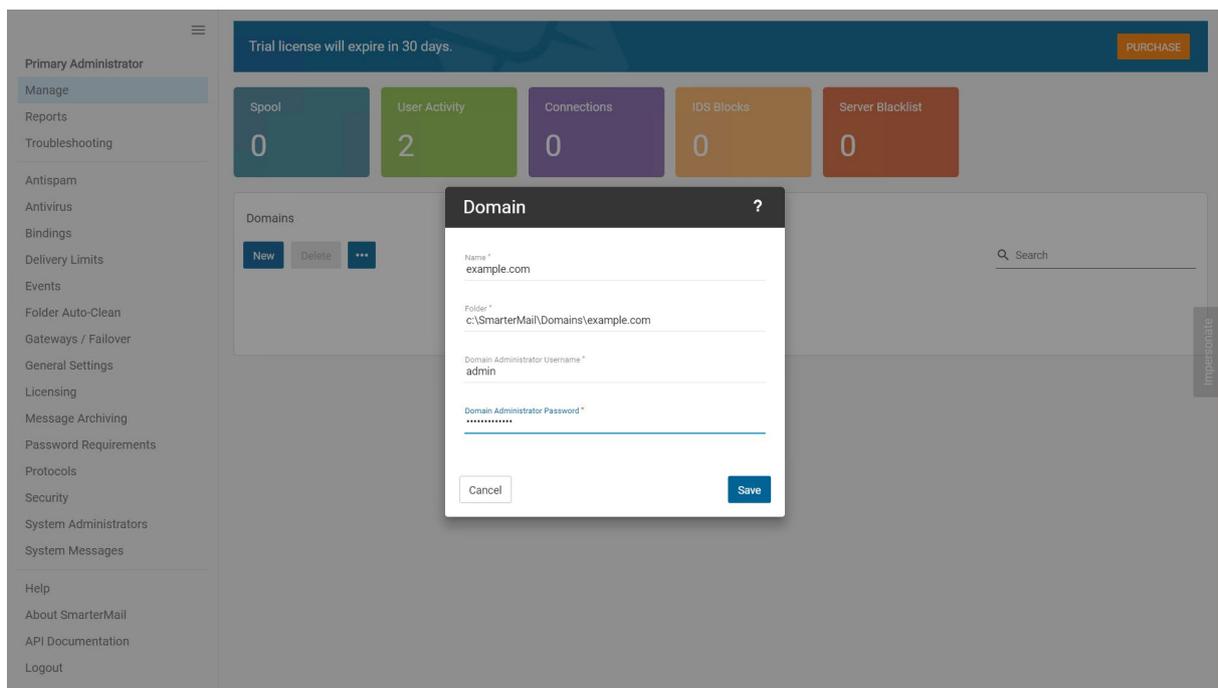
separate drive -- such as having your Spool on a D: drive -- you simply need to specify the paths you want to use.

When you click Finish in the Setup Wizard, you will automatically be logged in to SmarterMail using the primary administrator account you created earlier. From here, you'll be able to add domains and customize your mail server to meet your unique needs.

## Adding the First Domain

Now that the initial setup of your mail server is complete, you will need to add a domain to SmarterMail. Adding a domain to SmarterMail represents the business entity and the domain name (such as example.com) that will be used in the creation of individual user mailboxes. Note: Only domains that you purchased and own should be added to SmarterMail.

Adding a domain is simple: from the Manage area, simply click the New button. Once you do, you're presented with a modal window. Below is what that looks like:



Initially, you add in the domain name you want to add -- like "example.com" -- and then create the default domain administrator account for that domain. Once that information is saved, you can begin customizing the settings for that domain. That includes adding the Mailing List option, setting up any disk space, domain or other limits on the domain, activating or deactivating Features like XMPP, disposable addresses, etc. and much more. Once you've configured the domain, **BE SURE TO SAVE YOUR SETTINGS!**

After you've saved your settings, the new domain will appear in your Domains list, along with some

information about the domain, such as the number of mailboxes allowed, the domain's status, its current disk usage and more.

## **Where to Go From Here**

Depending on the use of SmarterMail, you can either add additional domains or, like many SmarterMail customers, you're BOTH a system admin AND a domain admin. If so, once the domain is added, it's time to start adding users, and then configuring those, just as you did your domain(s). If you need more assistance with adding domains or users, be sure to check out the Knowledge Base section of the SmarterTools Support Portal .

## General Information

### What is SmarterMail?

SmarterMail is an award-winning email, collaboration and group chat server that easily meets the needs of any sized business, from the individual proprietor to large corporations and enterprise organizations. Features include:

- A rich, modern webmail interface optimized for desktops, tablets and smartphones
- An integrated group chat system that can be used right from the web interface or integrated with third-party products like Adium, Pidgin or IM+
- Integrated Team Workspaces, that include group chat, inline file sharing, an interactive whiteboard and video conferencing
- Full collaboration features such as shared contacts, calendars, tasks and notes
- Integrated file storage PLUS the ability to use Google Drive, OneDrive and Dropbox for file storage
- Detailed reporting at the mailbox, domain and system levels
- Email and chat archiving, ideal for complicity requirements
- Intrusion detection/prevention
- Advanced synchronization with third-party email clients on desktop and mobile (Apple Mail, Microsoft Outlook, Android, iOS, etc.)
- Structured and multi-layered antispam and antivirus tools included at no additional charge
- Optional add-ons for Microsoft Exchange ActiveSync, Exchange Web Services, Message Sniffer, Cyren Premium Antispam and Cyren Zero-hour Antivirus
- Failover functionality
- Much more

With lower hardware requirements, superior stability and reduced maintenance costs, SmarterMail has significantly lower TCO and is the best-in-class Microsoft Exchange alternative for businesses and hosting companies.

### SmarterMail Edition Explanation

#### Professional Edition vs. Enterprise Edition

SmarterMail Professional Edition has all of the features required to host a fully-functional mail server. SmarterMail Enterprise Edition offers additional features, including:

- Team workspaces
- Group chat

- Global Address List (GAL)
- Failover functionality
- Ability to mark a domain as hosted externally
- Remote wiping of mobile devices
- Support for auto-discovery
- Scheduling Assistant support in Outlook for Mac (and future Outlook versions that support EWS )
- Advanced collaboration: shared calendars, contacts, tasks and notes
- LDAP support
- Active directory authentication
- Email and chat archiving for SOX, HIPAA or other regulatory requirements
- Over-the-air synchronization for Android, BlackBerry, iPhone and Windows Phones
- Two-way synchronization for Microsoft Outlook
- The ability to purchase and integrate one, or all, of the following licensed add-ons:
  - Microsoft Exchange ActiveSync for mobile and desktop synchronization (Windows Mail)
  - Microsoft Exchange Web Services for MacOS desktop client synchronization (Outlook for Mac, Apple Mail) and eM Client

## SmarterMail Free

SmarterMail Free contains much of the same functionality as SmarterMail Enterprise, but is limited to one domain with up to 10 users. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

## SmarterMail Edition Comparison

You can also refer to the following edition comparison chart for more information about each edition.

Features	1 Free	Pro	Enterprise
<b>Migration and Converters</b>			
Mail server converters for a wide variety of competitors	•	•	•
Mailbox migration for email, calendar, contacts and tasks	•	•	•
<b>Automation (Web Services/ SOAP )</b>			
Compatible with wide variety of control panel companies	•	•	•

Add/edit domains and users	•	•	•
Add/edit calendars, tasks and notes	•	•	•
Add/edit RSS feeds	•	•	•
Retrieve user and domain statistics via Web services 2	•	•	•
<b>Collaboration</b>			
Exchange ActiveSync support			Add-on
CalDAV and CardDAV support	•		•
Exchange Web Services support			Add-on
Outlook Scheduling Assistant support (requires Exchange Web Services add-on)	•		•
Microsoft Outlook 2007 and higher (2-way) synchronization	•		•
Microsoft Outlook 2000 and higher synchronization	•		•
Mozilla Thunderbird and Lightning synchronization	•		•
Webmail reminders system	•	•	•
Webmail availability of attendees	•	•	•
Webmail personal contacts	•	•	•
Webmail Global Address List (GAL)	•		•
Webmail personal calendars, tasks and notes	•	•	•
Shared calendars, contacts, tasks and notes	•		•
<b>Group Chat and Team Workspaces</b>			
XMPP server	•		•
Group chat	•		•
Team Workspaces	•		•
Search, view and print archived chats	•		•

Compatible with XMPP-supported chat clients	•		•
<b>Mail Server Protocols</b>			
SMTP	•	•	•
IMAP4 and IMAP IDLE	•	•	•
POP3	•	•	•
LDAP	•		•
Message retrieval via POP and IMAP	•	•	•
<b>Antispam Measures</b>			
Message Sniffer		Add-on	Add-on
Cyren Premium Antispam		Add-on	Add-on
Incoming and outbound spam checking	•	•	•
Spam quarantine (outgoing messages only)	•	•	•
Spam checking on POP3 message retrieval	•	•	•
Outgoing spammer detection and limiting	•	•	•
SpamAssassin-based Pattern Matching Engine	•	•	•
Support for distributed SpamAssassin servers (Linux or Windows)	•	•	•
SPF record checking	•	•	•
RBL listing detection	•	•	•
Reverse DNS checking	•	•	•
Greylisting (based on IP, sender location, spam weight, etc.)	•	•	•
DKIM Mail Signing	•	•	•
Configurable spam weights for system, domain and users	•	•	•
Configurable spam headers	•	•	•
Trusted senders	•	•	•

Requiring SMTP authentication for outgoing messages	•	•	•
Support for Declude	•	•	•
<b>Antivirus</b>			
Cyren Zero-hour Antivirus		Add-on	Add-on
Out-of-the-box ClamAV	•	•	•
Support for third-party real-time antivirus solutions	•	•	•
Support for third-party command-line antivirus solutions	•	•	•
Support for a remote ClamAV server (Linux or Windows)	•	•	•
Virus quarantine (outgoing messages only)	•	•	•
<b>Security/Attack Prevention</b>			
Incoming and outgoing TLS	•	•	•
Incoming and outgoing SSL	•	•	•
Active Directory Authentication (ADX)	•		•
Optional alternate SMTP port	•	•	•
SMTP authentication by domain	•	•	•
Restrict administrator access via IP	•	•	•
Brute force detection for Webmail	•	•	•
Manual and automatic IP whitelisting/blacklisting	•	•	•
Automatic harvest attack prevention	•	•	•
Automatic denial of service prevention	•	•	•
Malicious script filtering in webmail	•	•	•
Throttle user and domain activity	•	•	•

Throttle incoming bounces to prevent saturation	•	•	•
<b>Reporting</b>			
Real-time performance dashboards (traffic stats)	•	•	•
Basic reports (disk usage, file storage, etc.)	•	•	•
Advanced summary/trend reports (connections, traffic, spam, virus, etc.)	•	•	•
Data drill down for summary reports	•	•	•
Reporting statistics exposed as PerfMon counters	•		•
Export reports to CSV and tab formats	•	•	•
<b>Events and Notifications</b>			
Event-driven architecture	•	•	•
Notification profiles	•	•	•
Configurable system, domain and user events	•	•	•
Assign actions to events (e.g. command-line, notifications, etc.)	•	•	•
Default notification to all users when disk quotas are reached	•	•	•
<b>Message Archiving</b>			
Sarbanes-Oxley compliance 3	•		•
Enable message archiving by domain	•		•
Messages .ZIP compressed to reduce space necessary	•		•
Search, view and print archived messages	•		•
Messages stored in .EML format	•		•

Administration			
Mark a domain as hosted externally	•		•
Remote wipe of mobile devices (requires Exchange ActiveSync add-on)			•
Support for auto-discovery (requires Exchange ActiveSync add-on)			•
Failover functionality			•
Administration from a Web browser	•	•	•
Custom skinning	•	•	•
White labeling	•	•	•
Multiple system administrator accounts	•	•	•
Review and download log files from interface	•	•	•
Users can be limited to specific protocols (IMAP, POP, SMTP)	•	•	•
Mass propagation of settings for domains/users	•	•	•
Mass messaging to some or all users and domain administrators	•	•	•
Prioritize SMTP based on message type, domain or user	•		•
Spool functionality that allows third-party integration	•	•	•
Configurable outbound SMTP IP addresses	•	•	•
Multiple spools (smart spooling)	•	•	•
Manage all connections	•	•	•
Manage current blocks	•	•	•

Immediate blacklisting of connections and sessions	•	•	•
Configurable user password strength requirements	•	•	•
Configurable user settings by domain	•	•	•
Configurable logging for all protocols	•	•	•
Password compliance reporting and enforcement	•	•	•
Folder auto-clean to enforce user quotas	•	•	•
Domain-wide and system-wide footers	•	•	•
SmarterMail search indexing	•	•	•
Web Interface (Webmail)			
Multi-language compatible	•	•	•
Optimized AJAX controls provide desktop application performance	•	•	•
Compatible with mobile devices	•	•	•
Preview message attachments	•	•	•
New message notifications from anywhere in interface	•	•	•
Thumbnails for image file attachments	•	•	•
Download all attachments as .ZIP	•	•	•
Upload attachments in the background	•	•	•
File storage	•	•	•
Automatic save as draft	•	•	•
Click-to-map, click-to-call and click-to-mail functionality	•	•	•
Follow-up flagging	•	•	•
Linked emails and tasks	•	•	•

Advanced content filtering	•	•	•
Advanced spam filtering rules	•	•	•
User-level auto-clean	•	•	•
Support for multiple languages	•	•	•
Email address auto-complete similar to Microsoft Outlook	•	•	•
Import and export contacts	•	•	•
Support for user and domain aliases	•	•	•
Multiple signatures support	•	•	•
Multiple identity/SMTP support	•	•	•
<b>Mailing Lists</b>			
Bounce detection	•	•	•
Automatic removal of subscribers on bounces	•	•	•
Optional double opt-in	•	•	•
Subscriber custom fields	•	•	•
Friendly unsubscribe links in messages	•	•	•
Common subscriber database for all mailing lists	•	•	•
Merge variables and custom fields into messages (mail merge)	•	•	•
Toggle auto-generated response to mailing list commands	•	•	•
Enhanced mailing list compose with attachments	•	•	•
Customized command messages	•	•	•
Mail logging per subscriber	•	•	•

Message prioritization of mailing list	•	•	•
Throttling of mailing lists	•	•	•
<b>Gateways</b>			
Use as SmartHost or incoming gateway	•	•	•
Use as backup MX server	•	•	•
Use as outgoing gateway	•	•	•
User authentication and SSL/TLS support for outgoing gateways	•	•	•
Gateway authentication with other SmarterMail servers	•	•	•
Gateway can have domain exceptions	•	•	•
Spam checking available on gateways	•	•	•
Greylisting available on gateways	•	•	•

1 SmarterMail Free contains much of the same functionality as SmarterMail Enterprise, but is limited to one domain with up to 10 users. This is to give you an opportunity to try all of the features out before making a decision on what product to purchase.

2 For more information about using Web services with SmarterMail, see [Automation with Web Services](#) .

3 Consult your compliance professional to determine applicability to your organization.

For further assistance choosing the right edition, please contact the sales department by emailing [sales@smartertools.com](mailto:sales@smartertools.com) . During business hours you can also start a live chat or call us at 1.877.357.6278.

## How SmarterMail Works

There are two components that work together within SmarterMail: the web interface and the Windows Service.

## Web Interface

From an administration standpoint, the web interface can be used by both system admins and domain admins to manage all functions of the entire mail server as well as individual domains and user accounts. It also offers end users a versatile, yet lightweight, method of accessing their mailboxes, calendars, contacts and more using any standard web browser. Note: In addition to using the web interface, end users are able to use a desktop application such as Outlook, Apple Mail, Thunderbird, etc. or any one of the various mobile email clients out there for iOS and Android.

The web interface is flexible and versatile enough to be used on either a desktop or mobile browser. Therefore, both administrators and end users alike have a way to connect to the mail server from anywhere, at any time.

## Windows Service

The SmarterMail Service is the backbone of SmarterMail. Running as a Windows Service, it controls data storage and retrieval, protocol services and administrative functions. SmarterMail will not function without this service installed and running.

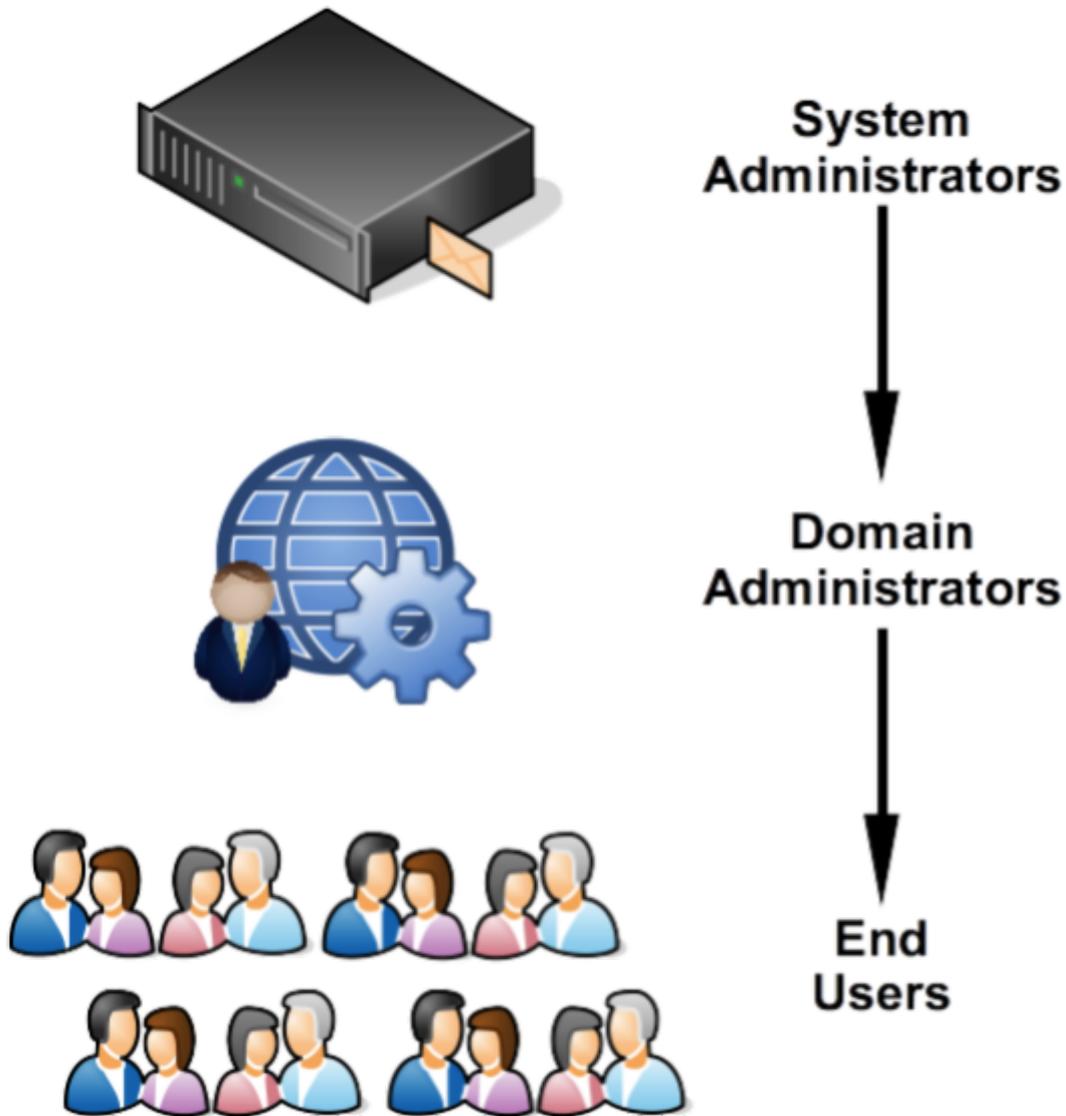
## Roles in SmarterMail

Generally, there are 3 major roles in SmarterMail:

- System Administrators - System Administrators are responsible for all aspects of running a safe, secure and high-performing mail server. That includes having solid antispam and antivirus solutions and rules in place, ensuring mail flows into and out of the spool, monitoring server memory and disk space usage, managing overall performance of the mail server and much, much more.
- Domain Administrators - Domain administrators are responsible for managing the domain as a whole. That means creating users, watching users' disk space usage, managing spam and virus controls for users, managing mailing lists, reviewing domain and user reports, and much more.
- End Users - End users are the lifeblood of SmarterMail. They use webmail all day, make calendar appointments, sync their mailbox, calendar and contacts to a variety of mobile and desktop devices and clients, and so much more. Users keep domain and system administrators on their toes, and are sure to let someone know if something isn't working correctly.

These various roles are hierarchical as well. The System Administrator manages the entire SmarterMail installation, overseeing all domains and users on the server, imposing limits and making judgments about which featured Domain Administrators can control for their users. The Domain Administrator manages just the domain they're part of, and, therefore, defers to the judgement and settings propagated by the System Administrator for their domain. Domain Administrators may have

the ability to manage some settings, but these options are granted to them by the System Administrator. Finally, End Users abide by the rules and settings imposed by the Domain Administrator. End users may have some control over their own accounts, but this flexibility is dictated by the Domain Administrator. The diagram, below, shows the "Order of Operations" of the various Roles within SmarterMail. (And, really, almost any other email server.):



# Installation and Deployment

## Browser Requirements

### Desktop

SmarterMail is fully supported by any modern and updated desktop browser. Minimum versions supported:

- Google Chrome 30
- FireFox 39
- Microsoft Edge 40
- Safari 10.1 (OS X 10.9)
- Opera 17
- Internet Explorer 11

Note: Any browser you use with SmarterMail should also support WebRTC to ensure video conferencing works for you and any participants. In addition, using any versions of the above browsers that are over a year old may lead to poor performance of the webmail interface.

### Mobile

In addition to working with most mobile email clients, not to mention third-party calendar and/or contact apps, SmarterMail offers the same robust webmail experience on mobile as it does on the desktop. As long as the mobile browser you use supports CSS, JavaScript and other modern scripting platforms, accessing the SmarterMail webmail interface is not a problem. Minimum versions supported: Chrome Android 4.4 and iOS 10.

## SmarterMail System Requirements

SmarterMail was designed to operate efficiently with multiple applications on the same server, based on the following system requirements:

- Windows Server 2012 R2 64-bit or higher - SmarterMail 16.x uses web sockets, which are not supported in IIS 7.5 or earlier.
- Microsoft .NET 4.5 Framework
- Dedicated IP Address
- Active internet connection
- Microsoft Internet Information Server (IIS) Note: SmarterMail 16.x no longer includes a default web server.

- Dedicated App Pool
- Minimal IIS Settings
  
- Application Development Features
  - .NET Extensibility
  - ASP.NET
  - ISAPI Extensions
  - ISAPI Filters
  - Common HTTP Features
  
- Default Documents
- Directory Browsing
- HTTP Errors
- Static Content
- Health and Diagnostics
  
- HTTP Logging
- Request Monitor
- Performance Features
  
- Static Content Compression
- Security
  
- Request Filtering

## **Can SmarterMail Be Installed on Amazon's EC2 Platform?**

To put it simply, yes. However, Amazon's EC2 platform, and other cloud providers, have some things to consider when determining how well any mail server will run. For example, some cloud services rotate the IP addresses that are used, which can cause issues with items like DNS records and affect mail delivery. Some have issues with disk I/O or have various other issues that adversely affect SmarterMail's performance. Therefore, while you can install SmarterMail on a cloud service such as Amazon's EC2, it is not necessarily recommended.

Note: Each installation and environment is unique. Extra load caused by excessive messages or email accounts and/or other factors may require more disk space, memory, database allocation, etc. than suggested in the Online Help. SmarterTools recommends that system administrators slowly add domains to the server and watch how they impact the server. In addition, email patterns indicate that the number of email messages per account are increasing by approximately 60% every two years. It is important to keep this growth in mind when planning your rollout.

## Installation

SmarterMail comes as a single installation file that contains everything necessary to run the product and get it set up on your server, regardless of the Edition that you intend to use. The features available are based on the license used during the activation process; if no license is entered, the Free Version will be installed. The SmarterMail installer can be downloaded from the SmarterTools website .

SmarterMail starts by installing the overall web service. This is just like any standard program installation: you select the path for the installation, etc. After the web service is installed, SmarterMail then runs its IIS Configuration Tool. This includes:

- Verification that IIS is installed. If IIS isn't present, the installation will end as IIS is a requirement for SmarterMail.
- A check to see if a SmarterMail site already exists on the server. If not, one is created. If a site already exists, you can select that site and use it for your installation. Using an existing site is perfect for users who are simply upgrading their installation to the latest version.
- If setting up a new site, you set the site name, set your hostname, select the IP(s) to use for the installation and the file path for the Management and Reporting Server. If using an existing site, these steps are bypassed; you're asked to select the site you wish to use for the installation.
- After setting up your new site name and paths, SmarterMail will create an app pool using that site name, then set up as a site in IIS that uses the new app pool.
- Next, the necessary permissions are set for the site.
- Finally, the installation is verified.
- Once everything is verified, the Getting Started Wizard opens using the server's default browser.

### Getting Started Wizard

The Getting Started Wizard is a simple, yet complete, 3-step process to get SmarterMail up and running on a server. Using it, you walk through 3 pages where you:

- Add, and activate, your license key. Activation enables the features available with the license level you enter. (I.e., Professional versus Enterprise features.) If no license key is entered, you have the ability to run the Free Version of SmarterMail indefinitely.
- Set up a primary system administrator account. The system administrator has full run of the SmarterMail server, which includes server-level settings for abuse detection, spam protection, etc. SmarterMail allows for more than 1 system administrator account, but at least 1 is needed in order to get SmarterMail set up.
- Set up the information necessary for your new mail server to be discoverable, and usable. This includes adding a hostname, binding server IPs and more.

- Set up the the proper paths so SmarterMail knows where to store configuration and mailbox information.

Once the Getting Started Wizard completes, you'll have a fully-functioning, and powerful, email server. You can begin adding in your domains and running one of the most fully-featured email servers on the market.

Please refer to the KB article [How To Install SmarterMail](#) for step-by-step installation instructions. You may also want to review the KB article on how to [Activate SmarterMail](#) .

## Licensing and Activation

SmarterMail installs as the Free Edition, which is good for use with 1 domain and up to 10 mailboxes. To upgrade to a paid version and unlock additional mailboxes and/or gain access to use purchased SmarterMail Add-ons , a license key must be activated. Furthermore, if the SmarterMail installation is moved to another server or upgraded to a different version or product level, the product will need to be activated again. System Administrators can use this section to activate SmarterMail or view current licensing information and limits.

Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request. If the server cannot connect for security reasons or due to internet connectivity, please contact [sales@smartertools.com](mailto:sales@smartertools.com) to request steps for a manual activation. A manual activation requires the server's hostname, which can be found by entering 'hostname' into the server's command prompt.

To access the Licensing section, log into SmarterMail as a System Administrator. Navigate to the Settings area, then click on Licensing in the navigation pane. The current licensing details for SmarterMail and its add-ons will be displayed, including the license key, license level information, status of the license or subscriptions, the number of items used out of the total limit, and an indication of whether an add-on trial is available.

The following actions can be taken:

- **Activate** - Select this option to activate a new SmarterMail license key. Activating a paid license requires authentication by verifying the SmarterTools account login credentials. Trial license keys do not require authentication to be activated.
- **Reactivate** - Select this option to refresh the limits of the SmarterMail installation. This will cause SmarterMail to callback to the SmarterTools servers to refresh the limits of the license key and should be used after purchasing an add-on, upgrading to the Enterprise edition or increasing the mailbox limit. Reactivating is immediate and does not require authentication with

the SmarterTools account credentials.

- Purchase - Select this option to be taken to the SmarterTools website where you can purchase a new license key or add-on.
- Start Trial - If an add-on trial is available, a Start Trial button will appear on its card. This allows the system administrator to test the functionality for up to 30 days. A trial can only be activated one time. To continue using the service after the trial, the add-on must be purchased.

Note: The ActiveSync trial is limited to 25 Mailboxes.

Note: If you are running a trial version of SmarterMail, it will automatically revert to SmarterMail Free when the trial expires.

## Upgrading SmarterMail

Because the SmarterMail download contains all of the installation files needed for any licensing level or edition, upgrading editions or levels is relatively easy. With a valid license key, companies can easily upgrade to the professional or enterprise editions or increase the number of mailboxes available in SmarterMail. For more information, see the Activating SmarterMail section of the online help. For step-by-step instructions, please refer to the KB article [How To Upgrade SmarterMail Levels and Editions](#) .

The steps for upgrading to SmarterMail from an older version of the application vary depending on which version you are currently using. For more information, please refer to the KB article [How To Upgrade SmarterMail](#) .

## Configuring SmarterMail for Failover

### Who Should Use This

This document is intended for use by administrators deploying SmarterMail in high-volume environments and/or for organizations that want to ensure maximum uptime. It provides minimal system requirements and considerations for deploying SmarterMail in a failover environment. Note: Failover requires activation of SmarterMail Enterprise. For licensing information for this product, contact the SmarterTools Sales Department .

### Failover Overview

SmarterMail Enterprise allows organizations to decrease the likelihood of service interruptions and virtually eliminate downtime by installing SmarterMail on a hot standby that is available should the primary mail server suffer a service interruption. For businesses that use their mail server as a mission-critical part of their operations, failover functionality ensures that the business continues to

communicate and that productivity remains at the highest levels possible, even if there is a primary server failure.

To review the Failover Servers configured for an installation, log into SmarterMail as a System Administrator and click on Gateways / Failover in the navigation pane. Then click on Failover Servers tab .

## Understanding How Failover Works

The main components of failover functionality are a primary server that acts as the default SmarterMail server and manages the licensing of the server cluster and a secondary server that remains connected and available in a “hot standby” mode until the primary server experiences problems with network access or system hardware.

If the primary server fails, SmarterMail can be configured to automatically enable the secondary server. When this occurs, the secondary server takes over responsibility for processing background threads and supporting all email functionality. This server will remain in active status until another failure occurs or the primary mail server comes back online.

The initial set up of SmarterMail’s failover functionality entails system administrators manually disabling both the node and SmarterMail service on the primary server and then starting the node and SmarterMail service on the hot standby. However, system administrators can easily use third-party monitoring systems and script an automated failover and recovery strategy as needed. An example of this is provided at the end of this document.

## Minimal System Requirements

- A minimum of two servers running Microsoft Windows Server 2012 R2 64-bit or higher. (Windows Server Core is not currently supported).
- Three IP addresses
- Both servers must have their server times synchronized
- NFS/SMB share for mail and system files. We recommend that the share is running on a NAS/SAN that is configured as RAID 10

## Adding Network Load Balancing to Your Servers

Note: This needs to be performed on each server that will be used in the failover environment.

- Open the server manager console
- Right click on Features in the tree view and select Add Features
- Check the box next to Network Load Balancing and select Next

- Click Install
- Once the installation finishes, click Close

## Configuring the Load Balanced Cluster for Use with Failover

- Navigate to Start -> Administrative Tools -> Network Load Balancing Manager
- Click the Cluster menu item and select New
- In the New Cluster: Connect window, type the IP of your primary server in the Host: text box and select New
- When the Interface Name and Interface IP appear, select the Interface Name and click Next
- Since this is the primary node, ensure the host Priority is set to 1
- In the New Cluster: Host Parameters window, confirm the IP address and Subnet mask are correct and change the initial host state to Stopped . This is to prevent any issues with connectivity if a machine randomly reboots or suffers from a hardware failure. If all nodes are set to Started for their initial host state, traffic will be split between the two (or more) machines. Note: Monitoring software can be used to execute scripts that will start and stop hot standbys in the event of a failure and recovery. If you are not executing scripts via monitoring software then all failover will need to be handled manually.
- Click Next
- In the New Cluster: Cluster IP Addresses window, click Add and enter in your cluster IP address and the same subnet mask as in Step 6
- Select Next
- In the New Cluster: Cluster Parameters window, confirm the IP address and subnet mask, then enter a Full Internet Name , though this is optional
- Ensure the cluster operation mode is set to Multicast
- Click Next
- In the New Cluster: Port Rules window, click Edit
- If you want you can restrict the cluster IP to work on an individual port or across a port range. You can also simply allow the cluster IP to work across all ports on the server
- Ensure your port rules are set to Single Host in the Filtering Mode section
- Click OK
- Verify your settings and click Finish to complete the setup

## Joining Additional Nodes to the Cluster

- From the secondary server navigate to Start -> Administrative Tools -> Network Load Balancing Manager
- Click the Cluster menu item and select Connect to Existing . Note: the existing cluster will need to be running before a secondary node can be added

- In the Connect to Existing: Connect window, enter the IP address of your existing cluster as the Host and click Connect
- Select the existing cluster that appears in the Clusters section and click Finish
- In the main Network Load Balancing Manager , expand Network Load Balancing Clusters and right click on your Cluster (it may be the IP address of your cluster) and select Add Host to Cluster
- In the Add Host to Cluster: Connect window, enter the IP address of the secondary server in the Host: section and click Connect
- When the Interface Name and Interface IP appear, select the Interface Name and click Next
- In the Add Host to Cluster: Host Parameters window, confirm the IP address and subnet mask and ensure the Initial Host State is set to Stopped . As this is the second node you're adding to your cluster, the Priority should be set at 2
- Click Next
- Just as with the primary node, in the Add Host to Cluster: Port Rules window you have the ability to set this node to respond via specific ports or a port range. If you wish to set these rules, click Edit . Otherwise, click Finish to complete the setup
- Wait for the nodes to converge and, if necessary, stop the secondary sever by right clicking the second server's name, select Control Host -> Stop

## Configure a Shared Service Directory

- Using Network File Sharing (NFS) or Samba (SMB), create a shared directory named SmarterMail , preferably on a NAS or SAN. NOTE: We recommend that this shared directory be hosted on a server that utilizes a RAID 10 configuration for the data.
- Inside that new SmarterMail folder, create a Service folder
- Configure your permissions accordingly. If special permissions are required, configure the SmarterMail service to run with the proper credentials within the Windows Services console. Note: When performing updates to the software, the credentials will need to be re-applied to the service

## Configuring a Fresh Installation of SmarterMail for Failover

- Install SmarterMail Enterprise on a server. This will be your hot standby. Leave all setup information as the default settings and after setup is complete, configure SmarterMail as an IIS site.
- Stop the SmarterMail service on the hot standby
- Edit the failoverConfig.xml file in the primary server's Service folder as follows:
  - SharedSystemFilePath - Set to the shared network shared system folder
  - FailoverIPAddress - Set this to the IP address of the Network Load Balancer

- IsEnabled - Set this to True
- Save this file, then copy it to the hot standby's Service folder and replace the existing failoverConfig.xml
- Copy over all folders, DAT and XML files from C:\Program Files (x86)\SmarterTools\SmarterMail\Service to the Service folder in the shared service directory you created
- Start the service on the hot standby server and verify that the paths are pointing to the network shared paths
- Activate your Enterprise key on the hot standby by logging into SmarterMail's management interface as the system admin and going to the activation section. Then stop the SmarterMail service on the server
- Start the service on the primary server, then reactivate your Enterprise license key in the SmarterMail management interface
- After re-activating the license, go to IP Addresses and bind all the ports to the load balancer's IP address and make sure no other IPs have any ports bound to them
- Both servers are now set up for failover. To verify this, log into the primary server as the system admin and go to Gateways / Failover . The servers that are part of the failover cluster will be displayed on the Failover Servers tab.

## Adding Failover to an Existing Installation of SmarterMail

Note: You will need to configure both servers for Network Load Balancing and set up a shared service directory. See the steps outlined in the Adding Network Load Balancing to Your Servers , Configuring the Load Balanced Cluster for Use with Failover , Joining Additional Nodes to the Cluster and Configure a Shared Service Directory sections earlier in this document for more information.

- Ensure the primary server is running the latest version of SmarterMail and that it is also configured as an IIS site. Ensure the IIS binding is pointing to your cluster IP address
- Install SmarterMail on a hot standby and configure it as an IIS site. Ensure the cluster node is stopped on the hot standby and ensure the IIS binding is also pointing to the cluster IP
- Stop the SmarterMail service on the hot standby
- Copy all of your mail data (located in C:\SmarterMail\ by default) to your shared service directory. If possible, use robocopy to do this because it will not result in any downtime for the mail service
- Once robocopy finishes, run it one more time. This second pass will only copy any new data
- Stop the SmarterMail service on the primary server
- Edit the failoverConfig.xml file in the primary server's Service folder as follows:

- SharedSystemFilePath - Set to the shared network shared system folder
- FailoverIPAddress - Set this to the IP address of the Network Load Balancer
- IsEnabled - Set this to True
- Run the robocopy one more time to copy over any modified files and remaining spool emails
- Copy over all folders, DAT and XML files from C:\Program Files (x86)\SmarterTools\SmarterMail\Service to the Service folder in the shared service directory you created
- Edit the domainlist.xml file in the shared Service folder and change the path of your domains to match the new NFS\SMB path. (For example, \\NAS01\SmarterMail\Domains\mydomain.com)
- Edit the mailconfig.xml file and replace any instances of the old physical path's with your new network location for SmarterMail. (For example, if all of your data was hosted on E:\Smartermail, you would then perform a find and replace for all instances of E:\Smartermail to \\NAS01\Smartermail).
- On the primary server, go to Start -> Administrative Tools -> Network Load Balancing Manager and stop the cluster node, then start the NLB on the secondary node
- Start the SmarterMail service on the hot standby
- Access SmarterMail's web interface at the cluster IP and sign in as the system admin
- Activate your Enterprise key on the hot standby by logging into SmarterMail's management interface as the system admin and going to the Licensing section.
- Verify that the data and settings are being picked up from the shared Service directory
- Stop the SmarterMail service on the hot standby and stop the secondary cluster node
- Start the cluster node and the SmarterMail service on the primary server
- Sign into the web interface on the primary server and re-activate the Enterprise license key by going to the Licensing section.
- Verify mail data and settings are being accessed from the shared service directory

## Scripting Failover

Below is an example of a PowerShell script that can be created to automate the SmarterMail failover process. You can utilize a third party monitoring product such as PRTG or SolarWinds (though there are many others) to execute this script when a failure is detected.

## Prepping PowerShell on the Servers

The servers will need to be configured to run remote scripts and accept remote PowerShell sessions. Therefore, on each server, run the following commands within an elevated PowerShell console:

- Set-ExecutionPolicy RemoteSigned - Press Y to accept
- Enable-PSRemoting -force

## Sample Script - Stop a Primary Server and Start the Hot Standby

In the scripts below, replace the “WAN” variable called in the –hostname parameter with the name of your interface. This can be obtained by opening a PowerShell console on the server and typing Get-NetlbClusterNodeNetworkInterface . Also replace Server01 and Server02 with the NetBIOS names of your servers.

```
$StopPrimary = New-PSSession -ComputerName Server01 Invoke-Command -Session
$StopPrimary -ScriptBlock { Import-Module NetworkLoadBalancingClusters ;
Stop-nlbclusternode -HostName Server01 -InterfaceName "WAN" ; import-module
WebAdministration ; stop-webapppool SmarterMail; set-service -computerName
Server01 -name mailservice -status stopped ; remove-pssession Server01}
```

```
$StartSecondary = New-PSSession -ComputerName Server02 Invoke-Command -
Session $StartSecondary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Start-nlbclusternode -HostName Server02 -
InterfaceName "WAN" ; set-service -computerName Server02 -name mailservice
-status running ; import-module WebAdministration ; start-webapppool
SmarterMail ; remove-pssession Server02 }
```

## Sample Script - Stop the Hot Standby and Re-start the Primary Server

These scripts can be used to bring the primary server back online and stop the hot standby after your monitoring software issues an all-clear.

```
$StopSecondary = New-PSSession -ComputerName Server02 Invoke-Command -
Session $StopSecondary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Stop-nlbclusternode -HostName Server02 -
InterfaceName "WAN" ; import-module WebAdministration ; stop-webapppool
SmarterMail; set-service -computerName Server02 -name mailservice -status
stopped ; remove-pssession Server02}
```

```
$StartPrimary = New-PSSession -ComputerName Server01 Invoke-Command -
Session $StartPrimary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Start-nlbclusternode -HostName Server01 -
InterfaceName "WAN" ; set-service -computerName Server01 -name mailservice
-status running ; import-module WebAdministration ; start-webapppool
SmarterMail ; remove-pssession Server01 }
```

## SmarterMail Add-ons

SmarterTools' add-on licensing system allows users to enhance the functionality of SmarterTools products. The following add-ons are available for SmarterMail:

- Microsoft Exchange ActiveSync
- Exchange Web Services
- Message Sniffer
- Cyren Premium Antispam
- Cyren Zero-hour Antivirus

### Microsoft Exchange ActiveSync

Microsoft Exchange ActiveSync is a data synchronization protocol that enables over-the-air access to email, calendars, tasks and notes from most mobile devices, including Android, Blackberry, iOS and Windows Phone devices. In addition, Exchange ActiveSync enables SmarterMail users to have access their email, calendars, tasks, and notes while working offline. Finally, Outlook 2013 for Windows also supports EAS for syncing mail, contacts and calendars.

For step-by-step instructions on how to activate and enable the Exchange ActiveSync add-on, please refer to the KB articles [Activate Microsoft Exchange ActiveSync](#) and [Configure Microsoft Exchange ActiveSync for Email Accounts](#) .

### Exchange Web Services

Exchange Web Services (EWS) seamlessly syncs SmarterMail messages, contacts, calendars and tasks to third-party email clients, including Microsoft Outlook 2015 for Mac from Office 365, Microsoft Outlook 2011 for Mac, Apple Mail, the Outlook client for iPad and eM Client. Exchange Web Services will eventually replace the outdated MAPI protocol, as EWS allows for faster communication between an email client and the mail server.

For step-by-step instructions on how to activate the EWS add-on, please refer to the KB article [Activate Exchange Web Services](#) .

### Message Sniffer

Message Sniffer complements SmarterMail's built-in antispam and antivirus features and accurately captures more than 99% of spam, viruses, and malware right out of the box. It learns about your environment automatically to optimize its performance and accuracy without your intervention; and it can be easily customized to meet your requirements. Because Message Sniffer runs all of its signatures locally, it doesn't need to communicate with any services outside of the mail server, making it quicker

and more efficient. Furthermore, the database is regularly and automatically updated to protect against new spam and malware attacks.

For step-by-step instructions on how to activate and enable the Message Sniffer add-on, please refer to the KB articles [Activate Message Sniffer](#) and [Enable Message Sniffer](#) .

## **Cyren Premium Antispam**

The Cyren Premium Antispam add-on is a service that uses Recurrent Pattern Detection (RPD) technology to protect against spam outbreaks in real time as messages are mass-distributed over the Internet. Rather than evaluating the content of messages, the Cyren Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge.

For step-by-step instructions on how to activate and enable the Cyren add-on, please refer to the KB articles [Activate Cyren Premium Antispam](#) and [Enable Cyren Premium Antispam](#) .

## **Cyren Zero-hour Antivirus**

The Cyren Zero-hour Antivirus add-on is a service that identifies viruses based on their unique distribution patterns and provides a complementary shield to conventional AV technology, protecting in the earliest moments of malware outbreaks and continuing protection as each new variant emerges.

For step-by-step instructions on how to activate and enable the Cyren add-on, please refer to the KB articles [Activate Cyren Zero-hour Antivirus](#) and [Enable Cyren Zero-hour Antivirus](#) .

## **Antispam and Antivirus Integration**

Powerful antispam and antivirus functionality is included with every copy of SmarterMail. However, some users may need extra protection or have fixed infrastructures. The solutions listed on this page have been tested with SmarterMail, but you can integrate almost any command-line scanner or real-time scanner with SmarterMail.

## **Message Sniffer**

Message Sniffer complements SmarterMail's built-in antispam and antivirus features and accurately captures more than 99% of spam, viruses, and malware right out of the box. It learns about your environment automatically to optimize its performance and accuracy without your intervention; and it can be easily customized to meet your requirements. Because Message Sniffer runs all of its signatures locally, it doesn't need to communicate with any services outside of the mail server, making it quicker and more efficient. Furthermore, the database is regularly and automatically updated to protect against new spam and malware attacks. The Message Sniffer solution is available as an integrated add-on to SmarterMail from the SmarterTools website and authorized SmarterTools resellers.

- [Learn more](#)
- [Buy now](#)

## **Cyren Premium Antispam**

When coupled with SmarterMail, Cyren Premium Spam protection delivers upwards of 99% spam protection. Cyren technology complements SmarterMail's out-of-the-box antispam features by adding email transmission pattern recognition. The Cyren Premium Antispam solution is available as an optional add-on to SmarterMail from the SmarterTools website and authorized SmarterTools resellers.

- [Learn more](#)
- [Buy now](#)

## **Cyren Zero-hour Antivirus**

The Cyren Zero-hour Antivirus uses Recurrent Pattern Detection to identify viruses based on their unique distribution patterns and provides a complementary shield to conventional AV technology. The Cyren Zero-hour Antivirus is available as an optional add-on to SmarterMail through the SmarterTools website and authorized SmarterTools resellers.

- [Learn more](#)
- [Buy now](#)

## **Barracuda Networks Inc.**

Barracuda Networks Inc. is the worldwide leader in email and Web security appliances. Barracuda Networks also provides world-class IM protection, application server load balancing, and message archiving appliances. More than 50,000 companies are protecting their networks with Barracuda Networks' comprehensive solutions. For integration instructions, please search the SmarterTools Knowledge Base .

- [Learn more](#)

## **ClamAV**

ClamAV is an open-source project that provides mail servers with decent protection from viruses at no cost. SmarterTools has found ClamAV to be a valuable scanner to use, especially in lower-volume environments. For integration instructions, please search the SmarterTools Knowledge Base .

- [Learn more](#)

## Declude

Declude is a third-party product that fills the role of antivirus, antispam, and email threat elimination. Declude offers complete integration with SmarterMail and has been optimized for high-load environments. Declude can use multiple scanners, reducing your exposure to new virus outbreaks.

Note: As of July, 2013, the property rights and assets for the Declude product were purchased by, and are currently supported and managed by, Mail's Best Friend.

- [Learn more](#)

## F-Prot

F-Prot, made by Frisk Software International, is a low-cost but effective solution that works well on low to medium volume environments. For integration instructions, please search the SmarterTools Knowledge Base .

- [Learn more](#)

## Trend Micro OfficeScan/Server Suite, Trend Micro ServerProtect

Trend Micro provides quality email scanning at a fraction of the price of comparable solutions. OfficeScan is built for enterprise environments and includes support for scanning non-Windows machines and an optional spyware blocker. For integration instructions, please search the SmarterTools Knowledge Base .

- [Learn more](#)

## Trend Micro Client/Server Suite for SMB

Trend Micro products get our recommendation for quality email scanning at a fraction of the price of comparable solutions. Protect your whole small or medium-sized business with one product. For integration instructions, please search the SmarterTools Knowledge Base .

- [Learn more](#)

## Control Panels

SmarterTools has spent considerable effort into providing a solid Web services implementation in its products in order to facilitate automation systems. As a result, more and more control panel providers are finding it easy to tie our products into their interfaces.

## **Odin Automation**

The integration of SmarterMail with Odin Automation is fully embedded within the Odin Automation product. Just download the APS package from within the Odin app portal.

- [Learn more](#)

## **Odin Plesk Panel (7.5 or higher)**

The integration of SmarterMail with Plesk is fully embedded within the Plesk product. No additional downloads are necessary to complete the integration.

- [Learn more](#)

## **WebSitePanel**

The integration of SmarterMail with WebSitePanel is fully embedded within the WebSitePanel product. No additional downloads are necessary to complete the integration.

- [Learn more](#)

## **WHMCS**

The integration of SmarterMail with WHMCS is available as a free add-on, which can be downloaded from the WHMCS App Store. Two modules are available: an admin area module for basic SmarterMail management, and a provisioning module that allows for multiple SmarterMail servers, adding domains, webmail log in and more.

- [Learn more](#)

## **Helm (part of the Plesk family)**

The integration of SmarterMail with Helm is fully embedded within the Helm product. No additional downloads are necessary to complete the integration.

- [Learn more](#)

## **HostingController**

The integration of SmarterMail with HostingController is fully embedded within the HostingController product. No additional downloads are necessary to complete the integration.

- [Learn more](#)

## Automation with Web Services

SmarterMail was built with custom configuration in mind. In addition to being able to customize the look and feel of SmarterMail, developers and/or system administrators have the ability to code to the SmarterMail application using several different Web services. These Web services allow developers and/or system administrators to automate a variety of different things: add domains to SmarterMail on the fly, grab domain-specific bandwidth usage for billing purposes, set details on a specific domain or server, update domain information, test servers added to the Web interface, and more.

The Automation with Web Services documentation may include services that have not been released to the public yet or are not available in the version you are using. For the most accurate Web services information, log into SmarterMail as the system administrator and click the settings icon . Then click Web Services in the navigation pane.

Note: Web services are intended for use by high-volume and automated businesses environments and hosting companies as they develop procedures to manage their SmarterMail system and work flow. In addition, this document assumes a basic understanding of Web service technologies and ASP.NET programming.

## Deployment Guides

### SmarterMail in Individual and Micro-business Deployments

#### Who Should Use This Document

This document is intended for use by individuals and micro-businesses as they develop an effective architecture for their SmarterMail system implementation. For best results, this document should be used in conjunction with the SmarterTools Knowledge Base .

#### Determining the Required Architecture

It is not unusual for a business to generate upwards of 50 legitimate mail messages, per employee, per day on average 1 . Considering the relative volume of spam and other abusive messages that are currently prevalent, the total number of messages processed per user/mailbox could easily exceed 250 per day 2 . Companies in technology, finance, and other communication-intensive industries might have much higher average email volumes. A tendency toward the prolific use of attachments and email graphics can also influence performance in mail environments. SmarterTools encourages readers to determine which architecture is right for them based upon anticipated email volume as opposed to

head-count because email load is a far better predictor of server requirements than the number of mailboxes on a system.

SmarterMail is built around a fully scalable model, so moving from one architecture recommendation to another requires relatively simple enhancements or modifications that can yield significant increases in performance and volume capacity.

That said, the authors have chosen to divide their recommendations into three categories: individual and micro-business architectures, small to medium-sized business architectures, and high-volume deployment architectures. For the purposes of these recommendations:

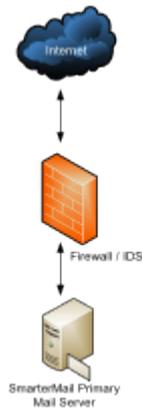
- Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 in/12,500 out). This infers a maximum of 100 mailboxes. Information regarding these architectures is available in this SmarterTools document.
- Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 in/200,000 out). This infers a maximum of 1,600 mailboxes. Information regarding these architectures can be found in SmarterMail in Small to Medium-sized Business Deployments , which is available for download on the SmarterTools website.
- High-volume deployments shall include ISPs, hosting companies, large businesses, and enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of mailboxes. Information regarding these architectures can be found in SmarterMail in High-Volume Deployments , which is available for download on the SmarterTools website.

1 Intel presentation, “IT Business Value”, 9-16-2005.

2 Nearly 80% of email messages sent world-wide are spam....”; Deleting Spam Costs Business Billions, Information Management Journal, May/June 2005, Nikki Swartz

## General Architecture

The general recommendation for SmarterMail architecture in an individual and micro-business environment (up to 25,000 messages per day) is as shown in Figure 1.



## **SmarterMail Primary Server**

This server is the central data processor and repository of your client's email. Users connect to this server using POP and IMAP to receive email, and use SMTP to send email out. Webmail is also hosted on this server to help those without email client software. In addition, the SmarterMail server performs all spam-blocking and virus protection operations.

Hardware recommended in this configuration for individuals and micro-businesses includes:

- Single-core processor
- 1 GB of RAM
- Windows Server 2008 R2 64-bit
- 7200 RPM SATA drive

## **Email Virtualization: SmarterMail in Virtual Server (VPS) Environments**

A virtual server environment is when one physical hardware device is partitioned so as to operate as two or more separate servers. SmarterMail can be deployed in all types of virtual server environments and has been tested with most major virtualization software (such as Hyper-V, VMware, Virtual Box, Virtuozzo and Zen).

Note: If using Hyper-V, SmarterTools recommends attaching a physical network adapter from the Hyper-V host to the SmarterMail virtual machine instead of using the virtual network manager to create virtual LANs/bridges. This is because there is a risk of losing network access to all of the virtual machines if they are all tied to a single virtual network and a network-related issue occurs on one of the virtual machines. By allowing the SmarterMail virtual machine a dedicated physical connection, this risk can be eliminated.

## **Recommended Spam Protection Measures**

SmarterMail uses a flexible, multi-layered spam prevention strategy to achieve 95% spam protection out-of-the-box. Initial spam settings are configured during installation, but system administrators can modify these settings to meet their unique needs at any time.

Since spam prevention strategy is an integral component of mail server deployment, a few of the most important spam-fighting measures available for SmarterMail are discussed below.

### **Message Sniffer**

Available as an optional add-on for SmarterMail, Message Sniffer complements SmarterMail's built-in antispam and antivirus features and accurately captures more than 99% of spam, viruses, and malware right out of the box. It learns about your environment automatically to optimize its performance and accuracy without your intervention; and it can be easily customized to meet your requirements. Because Message Sniffer runs all of its signatures locally, it doesn't need to communicate with any services outside of the mail server, making it quicker and more efficient. Furthermore, the database is regularly and automatically updated to protect against new spam and malware attacks.

For more information about the Message Sniffer add-on, please visit the SmarterTools website.

### **Cyren Premium Antispam**

Available as an optional add-on for SmarterMail, Cyren Premium Antispam uses Recurrent Pattern Detection (RPD) technology to protect against spam outbreaks in real time. Rather than evaluating the content of messages, the Cyren Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge. When combined with SmarterMail's out-of-the box antispam measures, the Cyren Premium Antispam add-on can effectively block 99% of spam from users' inboxes.

For more information about the Cyren Premium Antispam add-on, please visit the SmarterTools website.

### **SpamAssassin-based Pattern Matching Engine**

SmarterMail incorporates the SpamAssassin-based Pattern Matching Engine as part of its multi-layered spam protection strategy. Based on SpamAssassin technology, this powerful pattern matching engine can process substantially higher volumes of email per day without the need for a distributed antispam server. For more information, please refer to the SmarterMail Online Help.

### **Greylisting**

SmarterMail also includes greylisting, an effective method of blocking spam at the SMTP level. Using the greylisting feature in conjunction with SpamAssassin will prevent a large percentage of spam messages from being received by the SmarterMail server and drastically reduce the SpamAssassin work load. At the time of this writing the greylisting feature is effectively blocking up to 85% of spam at the SMTP level and greatly enhancing the effectiveness of SpamAssassin. The authors expect that the effectiveness of greylisting will diminish over time as spammers learn to adjust to this technique.

Additional information about greylisting can be found in the SmarterMail Online Help or at <http://greylisting.org> .

### **Other Built-in Antispam Measures**

SmarterMail's multi-layered spam prevention strategy also includes SPF, DKIM, reverse DNS, RBL, blacklist/whitelist, SMTP blocking, custom headers, and per-user spam weighting. More information about these important features is available in the SmarterMail Online Help and/or the SmarterTools Knowledge Base.

### **Remote SpamAssassin**

SmarterMail includes support for SpamAssassin, an open source spam filtering program. When implemented, SmarterMail will pass an incoming message to SpamAssassin. SpamAssassin returns the message with a spam score that can be used to filter mail alone or in conjunction with other spam filtering options in SmarterMail.

The Windows version is limited to processing a single message at a time—effectively handling approximately 25,000 spam messages per day. This version of SpamAssassin is usually more than adequate to meet the needs of individual and micro-business environments. Additional information about SpamAssassin, including download instructions, is available at <http://spamassassin.apache.org> .

### **Recommended Virus Protection Measures**

SmarterMail includes several antivirus enhancements that prevent the mail server from being compromised, including support for incoming and outgoing SSL/TLS connections, administrator access restriction by IP, intrusion detection (IDS), active directory authentication, harvest attack detection, denial of service (DOS) attack prevention, malicious script authentication, and brute force detection for webmail.

### **Cyren Zero-hour Antivirus**

Available as an optional add-on for SmarterMail, Cyren Zero-hour Antivirus can further extend SmarterMail's built-in virus protection measures. Rather than depending on heuristics, Cyren Zero-hour Antivirus uses Recurrent Pattern Detection (RPD) technology to scan the Internet and identify virus and malware outbreaks as soon as they emerge.

For more information about the Cyren Zero-hour add-on, please visit the SmarterTools website.

# SmarterMail in Small to Medium-sized Business Deployments

## Who Should Use This Document

This document is intended for use by small to medium-sized businesses as they develop an effective architecture for their SmarterMail system implementation. For best results, this document should be used in conjunction with the SmarterMail Online Help and the SmarterTools Knowledge Base .

## Determining the Required Architecture

It is not unusual for a business to generate upwards of 50 legitimate mail messages, per employee, per day on average <sup>1</sup> . Considering the relative volume of spam and other abusive messages that are currently prevalent, the total number of messages processed per user/mailbox could easily exceed 250 per day <sup>2</sup> . Companies in technology, finance, and other communication-intensive industries might have much higher average email volumes. A tendency toward the prolific use of attachments and email graphics can also influence performance in mail environments. SmarterTools encourages readers to determine which architecture is right for them based upon anticipated email volume as opposed to head-count because email load is a far better predictor of server requirements than the number of mailboxes on a system.

SmarterMail is built around a fully scalable model, so moving from one architecture recommendation to another requires relatively simple enhancements or modifications that can yield significant increases in performance and volume capacity.

That said, the authors have chosen to divide their recommendations into three categories: individual and micro-business architectures, small to medium-sized business architectures, and high-volume deployment architectures. For the purposes of these recommendations:

- Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 in/12,500 out). This infers a maximum of 100 mailboxes. Information regarding these architectures is available in this SmarterTools document. Information regarding these architectures can be found in SmarterMail in Individual and Micro-business Deployments , which is available for download on the SmarterTools website.
- Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 in/200,000 out). This infers a maximum of 1,600 mailboxes. Information regarding these architectures is available in this SmarterTools document.
- High-volume deployments shall include ISPs, hosting companies, large businesses, and

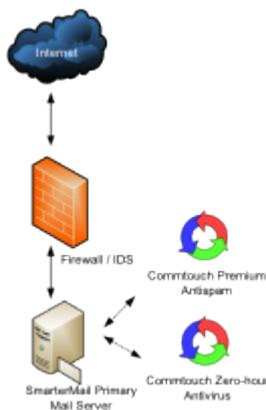
enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of mailboxes. Information regarding these architectures can be found in SmarterMail in High-Volume Deployments , which is available for download on the SmarterTools website.

1 Intel presentation, “IT Business Value”, 9-16-2005.

2 "Nearly 80% of email messages sent world-wide are spam..."; Deleting Spam Costs Business Billions, Information Management Journal, May/June 2005, Nikki Swartz

## General Architecture

The general recommendation for SmarterMail architecture in a small to medium-sized business environment (up to 200,000 messages per day) is as shown in Figure 1.



### SmarterMail Primary Server

This server is the central data processor and repository of your client’s email. Users connect to this server using POP and IMAP to receive email, and use SMTP to send email out. Webmail is also hosted on this server to help those without email client software. In addition, the SmarterMail server performs spam-blocking (with the exception of SpamAssassin) and virus protection operations.

Hardware recommended for this configuration in small to medium-sized businesses includes:

- Dual-core processor
- 2 GB of RAM
- Windows Server 2008 R2 64-bit
- 7200 RPM SATA drive (minimum)
- RAID 10 3

3 While a RAID 10 configuration is recommended for SmarterMail Primary Servers, the Authors recognize that some companies have policies that require the use of alternate RAID configurations. In this case, other RAID configurations may be used with the exception of RAID 1. The use of RAID 1

arrays in this configuration will likely result in a significant reduction in disk performance (up to a 50% loss vs. a single drive and up to 8 times slower than a 4-drive RAID 10 implementation).

### **Email Virtualization: SmarterMail in Virtual Server (VPS) Environments**

A virtual server environment is when one physical hardware device is partitioned so as to operate as two or more separate servers. SmarterMail can be deployed in all types of virtual server environments and has been tested with most major virtualization software (such as Hyper-V, VMware, Virtual Box, Virtuozzo and Zen).

Note: If using Hyper-V, SmarterTools recommends attaching a physical network adapter from the Hyper-V host to the SmarterMail virtual machine instead of using the virtual network manager to create virtual LANs/bridges. This is because there is a risk of losing network access to all of the virtual machines if they are all tied to a single virtual network and a network-related issue occurs on one of the virtual machines. By allowing the SmarterMail virtual machine a dedicated physical connection, this risk can be eliminated.

### **Recommended Spam Protection Measures**

SmarterMail uses a flexible, multi-layered spam prevention strategy to achieve 97% spam protection out-of-the-box. Initial spam settings are configured during installation, but system administrators can modify these settings to meet their unique needs at any time.

Since spam prevention strategy is an integral component of mail server deployment, a few of the most important spam-fighting measures available for SmarterMail are discussed below.

#### **Message Sniffer**

Available as an optional add-on for SmarterMail, Message Sniffer complements SmarterMail's built-in antispam and antivirus features and accurately captures more than 99% of spam, viruses, and malware right out of the box. It learns about your environment automatically to optimize its performance and accuracy without your intervention; and it can be easily customized to meet your requirements. Because Message Sniffer runs all of its signatures locally, it doesn't need to communicate with any services outside of the mail server, making it quicker and more efficient. Furthermore, the database is regularly and automatically updated to protect against new spam and malware attacks.

For more information about the Message Sniffer add-on, please visit the SmarterTools website.

#### **Cyren Premium Antispam**

Available as an optional add-on for SmarterMail, Cyren Premium Antispam uses recurrent pattern detection (RPD) technology to protect against spam outbreaks in real time. Rather than evaluating the content of messages, the Cyren Detection Center analyzes large volumes of Internet traffic in real

time, recognizing and protecting against new spam outbreaks the moment they emerge. When combined with SmarterMail's out-of-the box antispam measures, the Cyren Premium Antispam add-on can effectively block 99% of spam from users' inboxes.

For more information about the Cyren Premium Antispam add-on, please visit the SmarterTools website.

### **SpamAssassin-based Pattern Matching Engine**

SmarterMail incorporates the SpamAssassin-based Pattern Matching Engine as part of its multi-layered spam protection strategy. Based on SpamAssassin technology, this powerful pattern matching engine can process substantially higher volumes of email per day without the need for a distributed antispam server. For more information, please refer to the SmarterMail Online Help.

### **Greylisting**

SmarterMail includes greylisting—an effective method of blocking spam at the SMTP level. Using the greylisting feature in conjunction with SpamAssassin will prevent a large percentage of spam messages from being received by the SmarterMail server and drastically reduce the SpamAssassin work load. At the time of this writing the greylisting feature is effectively blocking up to 85% of spam at the SMTP level and greatly enhancing the effectiveness of SpamAssassin. The authors expect that the effectiveness of greylisting will diminish over time as spammers learn to adjust to this technique. Additional information about greylisting can be found in the SmarterMail Online Help or at <http://greylisting.org>.

### **Other Built-in Antispam Measures**

SmarterMail's multi-layered spam prevention strategy also includes SPF, DKIM, reverse DNS, RBL, blacklist/whitelist, SMTP blocking, custom headers, and per-user spam weighting. More information about these important features is available in the SmarterMail Online Help and/or the SmarterTools Knowledge Base.

### **Distributed SpamAssassin Servers**

SmarterMail includes support for SpamAssassin, an open source spam filtering program. When implemented, SmarterMail will pass an incoming message to SpamAssassin. SpamAssassin returns the message with a spam score that can be used to filter mail alone or in conjunction with the other spam filtering options in SmarterMail.

The Windows version is limited to processing a single message at a time, effectively handling approximately 25,000 spam messages per day and is usually more than adequate to the needs of individual and micro-business environments. However, the Linux version of SpamAssassin can process multiple spam messages simultaneously, allowing it to process significantly more messages

that its Windows counterpart. Therefore, SmarterTools recommends the stand-alone Linux version of SpamAssassin for small to medium-sized business environments (see Figure 2).

The Linux version of SpamAssassin is available at no charge from the SpamAssassin website and is installed on its own server (distributed environment). Additional information about SpamAssassin, including downloading instructions, is available at <http://spamassassin.apache.org>.

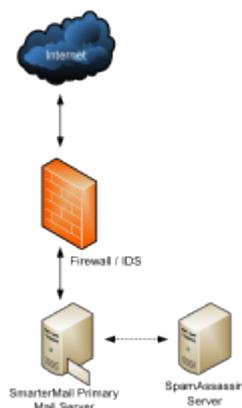
SmarterTools recommends the following hardware for stand-alone, distributed SpamAssassin servers:

- Dual-core processor
- 1 GB of RAM
- Dedicated SATA drive

It is possible to use a virtual server environment (Virtual PC, VMWare, etc.) to run SmarterMail (primary) in Windows and SpamAssassin (distributed) in Linux on the same physical hardware. This configuration may even be preferable in certain situations due to physical space requirements, fast communication between SmarterMail and the distributed SpamAssassin, and the cost savings of purchasing only one physical device.

If a virtual server configuration is chosen, where one physical server device operates as the primary mail server and contains the SpamAssassin Linux version as a distributed virtual server, SmarterTools recommends the following hardware:

- Dual-core processor
- 2 GB of RAM
- 7200 RPM SATA drive (minimum)
- RAID 10 4



4 While a RAID 10 configuration is recommended for SmarterMail Primary Servers, the Authors recognize that some companies have policies that require the use of alternate RAID configurations. In this case, other RAID configurations may be used with the exception of RAID 1. The use of RAID 1

arrays in this configuration will likely result in a significant reduction in disk performance (up to a 50% loss vs. a single drive and up to 8 times slower than a 4-drive RAID 10 implementation).

### **Recommended Virus Protection Measures**

SmarterMail includes several antivirus enhancements that prevent the mail server from being compromised, including support for incoming and outgoing SSL/TLS connections, administrator access restriction by IP, intrusion detection (IDS), active directory authentication, harvest attack detection, denial of service (DOS) attack prevention, malicious script authentication, and brute force detection for webmail.

#### **Cyren Zero-hour Antivirus**

Available as an optional add-on for SmarterMail, Cyren Zero-hour Antivirus can further extend SmarterMail's built-in virus protection measures. Rather than depending on heuristics, Cyren Zero-hour Antivirus uses Recurrent Pattern Detection (RPD) technology to scan the Internet and identify virus and malware outbreaks as soon as they emerge.

For more information about the Cyren Zero-hour add-on, please visit the SmarterTools website.

### **Extending Capacity via Outbound Gateways**

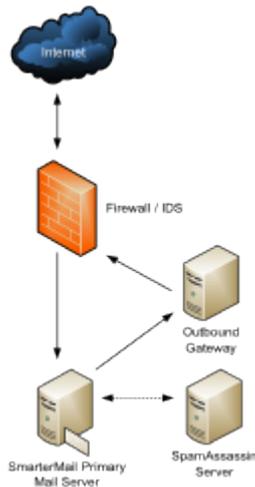
Outbound gateways are used for handling the delivery of remote mail to reduce the load on the primary mail server(s). An outbound gateway does not perform the tasks of storage and/or retrieval of end users' mail, freeing it to process many times more outgoing messages than a primary server could be expected to handle effectively.

Most small to medium-sized business environments will not need an outbound gateway. However, as a business grows, the addition of an outbound gateway can add significant capacity to a mail network and smooth the transition to higher volumes and larger networks. In the opinion of the authors, a single primary server in this configuration with distributed spam handling and a SmarterMail outbound gateway can effectively process upwards of 400,000 messages per day (200,000 in/200,000 out). This infers a maximum of 1,600 employees/mailboxes.

Businesses that choose to extend capacity via an outbound gateway can download SmarterMail Free and set it up as a free gateway server. More information about configuring SmarterMail as a free gateway server is available in the SmarterTools Knowledge Base.

### **General Architecture with an Outbound Gateway**

The general recommendation for SmarterMail architectures in a small to medium-sized business environments including an outbound gateway (up to 400,000 messages per day) is as shown in Figure 3.



## SmarterMail Outbound Gateway Servers

The Authors recommend the following hardware configuration for SmarterMail outbound gateways:

- Dual-core processor
- 1 GB of RAM
- SATA drive dedicated for the spool

This hardware configuration can support many SmarterMail servers, but SmarterTools recommends an ideal ratio of one gateway server for every five primary mail servers, reducing the risks of blacklisting and the effects of potential hardware failures.

## Using Third-party Solutions with SmarterMail

### Inbound Gateways

SmarterMail is designed to function at very high levels of performance in a small business environment without the need for an inbound gateway. Some companies choose to use spam and virus filtering solutions in front of their mail server—an inbound gateway. In the opinion of the authors, it should not be expected that the addition of an inbound gateway will have a significant impact on the performance of the mail network in a small to medium-sized business environment.

The majority of spam checks built into SmarterMail work off the IP address of the sender. When you use an inbound gateway, SmarterMail will receive all mail from that gateway which will cause the IP-based spam filters to no longer function correctly. For this reason, you will want all spam filtering to be performed via the inbound gateway.

The authors recommend the consideration of the following third-party solutions for inbound gateways:

- Barracuda: [www.barracudanetworks.com](http://www.barracudanetworks.com)
- Postini: [www.postini.com](http://www.postini.com)

Generally, inbound gateways are applicable only in higher-volume environments. Additional information and recommendations on SmarterMail implementations in various environments is available at the SmarterTools website.

## SmarterMail in High-volume Deployments

### Who Should Use This Document

This document is intended for use by large and enterprise businesses as they develop an effective architecture for their SmarterMail system implementation. For best results, this document should be used in conjunction the SmarterTools Knowledge Base .

### Determining the Required Architecture

It is not unusual for a business to generate upwards of 50 legitimate mail messages, per employee, per day on average. Considering the relative volume of spam and other abusive messages that are currently prevalent, the total number of messages processed per user/mailbox could easily exceed 250 per day . Companies in technology, finance, and other communication-intensive industries might have much higher average email volumes. A tendency toward the prolific use of attachments and email graphics can also influence performance in mail environments. SmarterTools encourages readers to determine which architecture is right for them based upon anticipated email volume as opposed to head-count because email load is a far better predictor of server requirements than the number of mailboxes on a system.

SmarterMail is built around a fully scalable model, so moving from one architecture recommendation to another requires relatively simple enhancements or modifications that can yield significant increases in performance and volume capacity.

That said, the authors have chosen to divide their recommendations into three categories: individual and micro-business architectures, small to medium-sized business architectures, and high-volume deployment architectures. For the purposes of these recommendations:

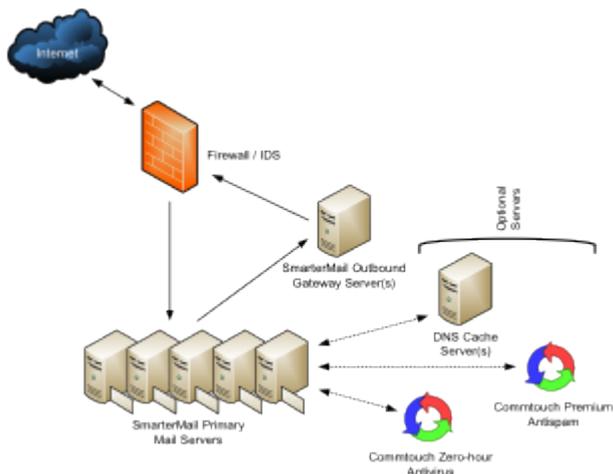
- Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 in/12,500 out). This infers a maximum of 100 mailboxes. Information regarding these architectures can be found in SmarterMail in Individual and Micro-business Deployments, which is available for download on the SmarterTools website.
- Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 in/200,000 out). This infers a maximum of 1,600 mailboxes. Information regarding these architectures can be found in SmarterMail in Small to Medium-sized Business Deployments, which is available for download on the

SmarterTools website.

- High-volume deployments shall include ISPs, hosting companies, large businesses, and enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of mailboxes. Information regarding these architectures is available in this SmarterTools document.

## General Architecture

The general recommendation for the high-volume system architecture is detailed in Figure 1 below.



### SmarterMail Primary Servers

The SmarterMail servers are the central data repositories of email. Users connect to these servers using POP and IMAP to receive email, and use SMTP to send email out. Webmail is also established on these servers for those choosing to access email through the Web interface. A SmarterMail network may contain one or more mail servers. Under normal activity—and assuming sufficient disk space 3—each server should be able to handle up to 40,000 users per server (1 million messages per day).

For high-volume deployments utilizing this architecture, SmarterTools recommends the following server specifications for SmarterMail servers:

- Dual-core, server-grade processors
- 4 GB of RAM
- RAID 1 array for the operating system and program files
- One single drive or RAID 0 array for the email spool
- RAID 10 4 array to store user data and email
- Windows Server 2008 R2 64-bit
- Virtual machines are not recommended for large deployments as restrictions on disk I/O can seriously impact performance.

## **SmarterMail Outbound Gateways**

Outbound gateways are used for handling the delivery of remote mail to reduce the load on the primary mail server(s). An outbound gateway does not perform the tasks of storage and/or retrieval of end users' mail via POP, IMAP or webmail, freeing it to process many times more outgoing messages than a primary server could be expected to handle effectively.

SmarterMail includes support for round-robin gateway delivery (all types of gateway servers) and advanced gateway load-balancing (SmarterMail gateways only) to further balance the load on your gateways and making them better at delivering high volumes of mail quickly. Businesses setting up an outbound gateway can download SmarterMail Free and set it up as a free gateway server. More information about configuring SmarterMail as a free gateway server is available in the SmarterTools Knowledge Base.

SmarterTools recommends the following hardware for SmarterMail outbound gateways:

- Dual-core processor
- 1 GB of RAM
- SATA drive dedicated for the spool

This hardware configuration can support many SmarterMail servers, but SmarterTools recommends an ideal ratio of one gateway server for every five primary mail servers, reducing the risks of blacklisting and the effects of potential hardware failures.

## **Configuring SmarterMail for Failover**

SmarterMail Enterprise allows organizations to decrease the likelihood of service interruptions and virtually eliminate downtime by installing SmarterMail on a hot standby that is available should the primary mail server suffer a service interruption. For businesses that use their mail server as a mission-critical part of their operations, failover functionality ensures that the business continues to communicate and that productivity remains at the highest levels possible, even if there is a primary server failure.

For more information on configuring failover, see the Configuring SmarterMail for Failover section of the online help.

## **Recommended Spam Protection Measures**

SmarterMail uses a flexible, multi-layered spam prevention strategy to achieve 97% spam protection out-of-the-box. Initial spam settings are configured during installation, but system administrators can modify these settings to meet their unique needs at any time.

Since spam prevention strategy is an integral component of mail server deployment, a few of the most important spam-fighting measures available for SmarterMail are discussed below.

### **Message Sniffer**

Available as an optional add-on for SmarterMail, Message Sniffer complements SmarterMail's built-in antispam and antivirus features and accurately captures more than 99% of spam, viruses, and malware right out of the box. It learns about your environment automatically to optimize its performance and accuracy without your intervention; and it can be easily customized to meet your requirements. Because Message Sniffer runs all of its signatures locally, it doesn't need to communicate with any services outside of the mail server, making it quicker and more efficient. Furthermore, the database is regularly and automatically updated to protect against new spam and malware attacks.

For more information about the Message Sniffer add-on, please visit the SmarterTools website.

### **Cyren Premium Antispam**

Available as an optional add-on for SmarterMail, Cyren Premium Antispam uses Recurrent Pattern Detection (RPD) technology to protect against spam outbreaks in real time. Rather than evaluating the content of messages, the Cyren Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge. When combined with SmarterMail's out-of-the box antispam measures, the Cyren Premium Antispam add-on can effectively block 99% of spam from users' inboxes.

For more information about the Cyren Premium Antispam add-on, please visit the SmarterTools website.

### **SpamAssassin-based Pattern Matching Engine**

SmarterMail incorporates the SpamAssassin-based Pattern Matching Engine as part of its multi-layered spam protection strategy. Based on SpamAssassin technology, this powerful pattern matching engine can process substantially higher volumes of email per day without the need for a distributed antispam server. For more information, please refer to the SmarterMail Online Help.

### **Greylisting**

SmarterMail includes greylisting, an effective method of blocking spam at the SMTP level. Using the greylisting feature in conjunction with SpamAssassin will prevent a large percentage of spam messages from being received by the SmarterMail server and drastically reduce the SpamAssassin work load. At the time of this writing, the greylisting feature is effectively blocking up to 85% of spam at the SMTP level and greatly enhancing the effectiveness of SpamAssassin. The authors expect that the effectiveness of greylisting will diminish over time as spammers learn to adjust to this technique.

Additional information about greylisting can be found in the SmarterMail Online Help or at <http://greylisting.org>.

### **Other Built-in Antispam Measures**

SmarterMail's multi-layered spam prevention strategy also includes SPF, DKIM, reverse DNS, RBL, blacklist/whitelist, SMTP blocking, custom headers, and per-user spam weighting. More information about these important features is available in the SmarterMail Online Help and/or the SmarterTools Knowledge Base.

### **Recommended Virus Protection Measures**

SmarterMail includes several antivirus enhancements that prevent the mail server from being compromised, including support for incoming and outgoing SSL/TLS connections, administrator access restriction by IP, intrusion detection (IDS), active directory authentication, harvest attack detection, denial of service (DOS) attack prevention, malicious script authentication, and brute force detection for webmail.

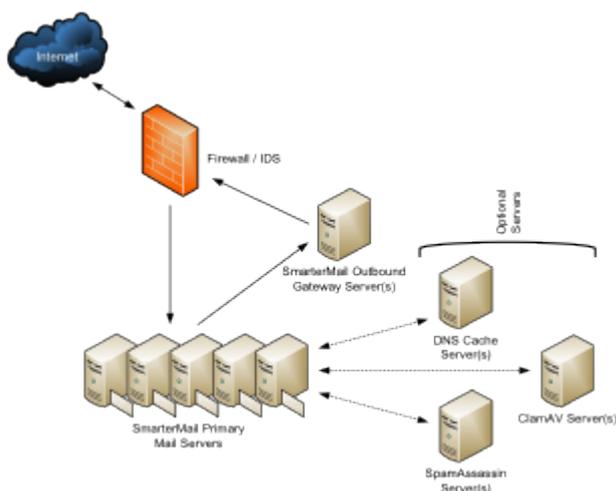
### **Cyren Zero-hour Antivirus**

Available as an optional add-on for SmarterMail, Cyren Zero-hour Antivirus can further extend SmarterMail's built-in virus protection measures. Rather than depending on heuristics, Cyren Zero-hour Antivirus uses Recurrent Pattern Detection (RPD) technology to scan the Internet and identify virus and malware outbreaks as soon as they emerge.

For more information about the Cyren Zero-hour Antivirus add-on, please visit the SmarterTools website.

## **Optional Servers**

An alternative recommendation for the high-volume system architecture that incorporates optional servers is detailed in Figure 2 below.



## **Distributed SpamAssassin Servers**

SmarterMail includes support for SpamAssassin, an open source spam filtering program. When implemented, SmarterMail will pass an incoming message to SpamAssassin. SpamAssassin returns the message with a spam score which can be used to filter mail alone or in conjunction the other spam filtering options in SmarterMail.

The Windows version is limited to processing a single message at a time, effectively handling approximately 100-200k spam messages per day and is usually more than adequate to the needs of low and medium-volume environments. However, the Linux version of SpamAssassin can process multiple spam messages simultaneously, allowing it to process significantly more messages than its Windows counterpart. Therefore, SmarterTools recommends the stand-alone Linux version of SpamAssassin for high-volume environments (see Figure 2).

Additional information about SpamAssassin, including downloading instructions, is available at <http://spamassassin.apache.org>.

SmarterTools recommends the following hardware for stand-alone SpamAssassin servers:

- Dual-core processor
- 1 GB of RAM
- Dedicated SATA drive

## **ClamAV Servers**

SmarterMail includes support for ClamAV, an open-source project offering superior antivirus protection that resides on the primary mail server, or in high-volume environments, on a remote server in a Linux environment. More information about ClamAV is available at [www.clamav.net](http://www.clamav.net).

SmarterTools recommends the following hardware for stand-alone ClamAV servers:

- Dual-core processor
- 1 GB of RAM
- Dedicated SATA drive

## **DNS Cache Servers**

DNS cache servers can be added to speed email delivery through systems with exceptionally heavy traffic or to take the load off of existing network DNS servers in Web hosting (or other) environments in which Web traffic is very high. Adding an email-dedicated DNS cache server also allows the control of caching rates for DNS queries for mail servers independently of the main network. The requirements—or lack thereof—for email-dedicated DNS servers vary greatly from organization to

organization. Therefore, SmarterTools does not currently provide a hardware or configuration recommendation for DNS servers.

Additional information regarding DNS and DNS servers is available on the following websites:

- [www.dns.net/dnsrd/servers/](http://www.dns.net/dnsrd/servers/)
- [http://en.wikipedia.org/wiki/Domain\\_name\\_system](http://en.wikipedia.org/wiki/Domain_name_system)

If it is determined that a system requires email-dedicated DNS caching, SmarterTools recommends a BIND solution. Information regarding BIND solutions is available at <http://www.isc.org/index.pl?/sw/bind/>.

## Using SmarterMail with Third-party Solutions

### Inbound Gateways

In certain ultra-high-volume environments, inbound gateways are used to offload spam and virus checking from the primary server(s). In such environments, SmarterTools does not recommend that SmarterMail servers be used as inbound gateways.

In the relatively rare event that an inbound gateway becomes necessary, SmarterTools suggests the consideration of a third-party solution. Most spam checks and filters built into SmarterMail utilize the IP address of the mail sender. When using a third-party inbound gateway, all mail passes through that gateway prior to arriving at the SmarterMail server(s), which will negatively impact the functioning of the IP-based spam filters. For this reason, you will want all spam filtering to be done via the incoming gateway when using a third-party inbound gateway solution.

SmarterTools recommends the following third-party solutions for inbound gateways in ultra-high-volume environments:

- Barracuda: [www.barracudanetworks.com](http://www.barracudanetworks.com).
- Postini: [www.postini.com](http://www.postini.com).

For full list of third-party antispam/antivirus products that have been tested with SmarterMail, refer to the SmarterMail Resources Resources page on the SmarterTools website.

## Summary

SmarterMail is a good choice for high-volume mail environments. The proper configuration and system architecture outlined in this document will provide a solid, reliable foundation. Because variations exist due to different volumes and client needs, SmarterTools suggests starting with these recommendations and then adjusting server proportions, limits and specifications based on the usage patterns that result.

1 Intel presentation, "IT Business Value", 9-16-2005.

2 "Nearly 80% of email messages sent world-wide are spam..."; Deleting Spam Costs Business Billions, Information Management Journal, May/June 2005, Nikki Swartz.

3 The amount of disk space allocated per user and per domain is set by the system administrator.

4 While a RAID 10 configuration is recommended for SmarterMail Primary Servers, the authors recognize that some companies have policies that require the use of alternate RAID configurations. In this case, other RAID configurations may be used with the exception of RAID 1. The use of RAID 1 arrays in this configuration will likely result in a significant reduction in disk performance (up to a 50% loss vs. a single drive and up to 8 times slower than a 4-drive RAID 10 implementation.

## Integrations

### **Base WHMCS SmarterMail Provisioning Module**

#### **Package Description**

The WHMCS SmarterMail module is an open source module developed in PHP that integrates SmarterMail as an add-on into WHMCS that can be attached to Product/Services to provision SmarterMail domains as well as point MX and CNAME records on WHM/CPANEL to a SmarterMail server using standard settings across all WHMCS users.

#### **Package Goals**

The primary goal of the WHMCS SmarterMail module was to reduce server administrator labor. Previously, MX and CNAME records would have to be entered manually, as well as the domain creation in SmarterMail. With the module installed, the whole process is automated. Not only is everything created for you on initialization, but also for suspension, deletion, un suspension, and termination.

The package provides the following services:

- Create, Suspend, UnSuspend, Terminate, and Delete Domains from a SmarterMail server using a standard set of defaults.
- Multiple SmarterMail Server Support with Management side interface for adding, deleting, suspending, unsuspending SmarterMail servers as well as setting max domain levels per server.
- Client side link to SmarterMail login.
- SSL support.

## Prerequisites

- Existing installation of WHMCS (version 5.0 and above)
- Existing installation of WHM/CPanel
- Licensed installation of SmarterMail

## Installing the SmarterMail Module

Installing the SmarterMail module is no different than installing any modules within WHMCS. Below are the steps necessary to get a SmarterMail installation added to WHMCS.

- Extract the SmarterMail module
- Place contents in your WHMCS directory under `..modules/addons/smartermail`
- Navigate to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`
- Click "Activate" next to the SmarterMail Provisioning Module
- Go back to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`
- Click "Add New Add On"
- Set desired add-on settings and make sure you attach to at least one product/service
- Next, find the Addon ID
- If this is the first add-on created in this WHMCS instance, then the ID will be 1.
- If there are multiple add-ons in WHMCS, you may need to look in the database to find out the SmarterMail add-on ID.
- To find the add-on ID in the database, use a MySQL database tool like MySQL Workbench
- Connect to your database and run the following query:

```
SELECT addontable.id FROM yourDatabaseName.tblAddons as addontable WHERE
addontable.name=yourAddonName Make sure you replace 'yourDatabaseName' with
the name of your database and 'yourAddonName' with the name of the add-on
you created in Steps 6 - 7.
```

- Go back to `http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php`
- Click "Configure" (it's to the right of "Activate")
- Fill in the Addon ID you found in Step 8
- Check "Module Logging" (you can turn this off later when everything is running smoothly or simply leave it running indefinitely)
- Check "SSL" if your WHMCS address begins with `'https://'`
- If you want to give specific Roles the ability to modify the SmarterMail servers from within the management interface of WHMCS, select them from the list
- Click "Save Changes" and that's it! The SmarterMail module is installed and you can now configure SmarterMail servers

## Configuring Servers

Once the SmarterMail module is installed, you can begin adding new mail servers to your WHMCS installation and begin provisioning domains and mailboxes within SmarterMail.

- Navigate to  
[http\(s\)://your\\_WHMCS\\_hostname.com/admin/configaddonmods.php?module=smartermail](http(s)://your_WHMCS_hostname.com/admin/configaddonmods.php?module=smartermail)
- Here, you're presented with the SmarterMail server interface. This is where you create, suspend, set max domain counts and delete SmarterMail servers
- Click "New Server"
- Fill in the following settings:
  - Server Name - The friendly name for your SmarterMail server within WHMCS
  - Server URL - The domain name and URL of the server. (E.g., <https://mail.YourDomain.com>)
  - Domain Path - The path on the server where you store the Domain folders. (E.g., `c:\\SmarterMail\\Domains`)
  - Server Admin Username - The administrator username for this server
  - Server Admin Password - The password associated with the Server Admin Username
  - Max Domains - The maximum number of domains allowed on the server
  - Status - The status of the server. Note: Only "Active" servers will allow provisioning of domains
- Click "Submit" to create the new server
- You can now test provisioning domains and accounts in SmarterMail
- If you experience problems, and Module Logging is enabled, you can go to  
[http\(s\)://your\\_WHMCS\\_hostname.com/admin/addonmodules.php?module=smartermail](http(s)://your_WHMCS_hostname.com/admin/addonmodules.php?module=smartermail) to check the error logs

## WHMCS Product/Service Module

### Package Description

The WHMCS SmarterMail module is an open source module developed in PHP that integrates SmarterMail as a Product\Service into WHMCS. This allows the ability to create packages based off of custom settings available within the SmarterMail software that can then be used by administrators to offer varying levels of SmarterMail access to end users. For example, the ability to create packages based off of mailbox counts, disk space allocations, etc. Additionally in the Client Area of WHMCS, the ability to manage SmarterMail has been added as well for end users.

## Package Goals

The primary goal of the WHMCS server module is to give server administrators more flexibility in regards to how SmarterMail is offered as a service. With the use of this SmarterMail Server module, Product\Service items can be created specific to the SmarterMail settings. This means that WHMCS users can create custom packages, unique to users across the WHMCS install versus standard packages that are applied to all users. These customizable features include but not limited to: specifying the number of domain users, domain size limits, number of aliases, etc.

The package also provides the following services:

### Admin Area Features

- Create Domain
- Suspend Domain
- Unsuspend Domain
- Terminate Domain
- Change Package
- Change Password

### Client Area Features

- Manage Mailboxes
- Add Mailboxes
- Delete Mailboxes
- Modify Mailbox Settings
- Change Mailbox Password
- Manage User Aliases
- Add Aliases
- Delete Aliases
- Change Password

## Prerequisites

- Existing installation of WHMCS (version 5.0 and above)
- Existing installation of WHM/CPanel
- Licensed installatino of SmarterMail (10.x and above)

## Installing the SmarterMail Server Module

First the package will need to be installed in the WHMCS Control Panel. To do so, use the following instructions:

- Download ZIP package to your WHMCS server
- Navigate to `../modules/servers/` and create a folder called 'smartermail', all lower case
- Extract and upload contents of the zip file you downloaded into the smartermail folder you created

## Configure WHMCS to Access and Group SmarterMail Servers

Once the SmarterMail package has been added, you now have the ability to configure the SmarterMail servers to be used. To configure the SmarterMail servers to be used, do the following:

- Login to WHMCS as a system administrator
- Click Setup → Products\Services → Servers
- Click add new server across the top
- Enter Server information for the SmarterMail server to be added
- Under Server Details, select the Type of 'smartermail' and enter system administrator credentials
- Save your changes

Once the server has been added, you then have the ability to create a group of SmarterMail servers.

- Click Create New Group across the top
- Enter a name for the group of SmarterMail servers, select and add your server that was recently added
- Save your changes

## Configure Your Product/Service

Now that the package has been added and the SmarterMail servers have been configured, you now have the ability to configure individual Product\Service packages within WHMCS. To do so:

- Click Setup → Products\Services → Products\Services
- You have the option of creating a new product group if you see fit, otherwise click Create a new product
- Select product type, product group, and give product name
- Click continue
- Edit the various product tabs as you see fit such as details and pricing
- For the Module Settings Tab - Select Smartermail as the Module Name, and select the

appropriate Server Group that was created earlier

- This will then allow you to configure data specific to the packages being created

## WHMCS Client Area

The WHMCS SmarterMail module also allows WHMCS users to interact with their SmarterMail domain. Abilities include actions such as adding and editing both users as well as user aliases. To access this feature as a WHMCS end user:

Client Area To access SmarterMail through the client area:

- Click My Services → Product details
- Click Manage SmarterMail Users and Aliases
- You will find the option to add both users as well as aliases. Also the option to edit each of the corresponding items

Add User To add a user:

- Click Add SmarterMail User
- Enter requested information
- Click Create SmarterMail User

Edit User To edit a user:

- From the Manage SmarterMail Users page, select the user to edit, and click Edit SmarterMail User
- Change or update any of the specified fields for each user
- Also note the ability to change the status of an account or delete an account. NOTE: deleting the account is permanent

Add Alias To add an alias:

- Click Add SmarterMail Alias
- Enter name for alias
- Enter accounts the alias will send too
- Click Create SmarterMail Alias

Edit Alias To edit an alias:

- From the Manage SmarterMail Aliases page, select the alias to edit, and click Edit SmarterMail Alias
- Add or remove any email addresses that you'd like
- Also note the ability to delete an alias. NOTE: deleting the alias is permanent

# Odin APS (Automated Provisioning System) Package for SmarterMail

## Package Description

The SmarterMail APS package is designed to integrate SmarterTools' SmarterMail email server software within the Parallels Operations Automation system. SmarterMail can then be used as the mail server of choice for Odin administrators when creating hosting plans for resale, when adding domains that require email services and more.

## Package Goals

The goal of the SmarterMail APS package was to provide a means of easily managing domains, mailboxes, mailings lists and aliases. To those ends, services provided include:

- Domain Services
  - Add / Remove Domains
  - Add / Edit / Remove Domain Aliases
  - Add / Edit / Remove User Aliases
  - Domain Disk Space Reporting
  - Mailbox Services
    - Add / Edit / Remove Mailboxes
    - Configure Email Forwarding Settings
    - Configure Auto-responder Settings
    - Mail List Services
      - Add / Edit / Remove Mailing Lists
      - Add / Edit / Remove Mailing List Subscribers

## Prerequisites

This goes over the list of requirements that are needed before installing, configuring and using the SmarterMail APS package. These requirements are as follows:

- Existing installation of Parallels Operations Automation (PoA)
- Existing, licensed installation of SmarterMail 9.x or above
- Required knowledge in the following areas:
  - Application Manager

- APS catalog
- Importing packages
- Provisioning Manager
  
- Resource templates
- Service templates
- Customer Manager
  
- Creating of customers
- System director
  
- Task manager

## Installation

This covers getting the APS package set up with the PoA system. There are two ways to install the SmarterMail APS package within PoA using the Application Manager: from Applications or the APS Catalog

- Applications
  
- Expand Service Director
- Expand Application Manager
- Select Applications
- Click on “Import Package”
- Select “local file” option and click “Choose File”
- Provide the path to the SmarterMail APS
- Check “Enabled” option
- Finally click “Submit” and the package will be scheduled for importing
- APS Catalog
  
- Expand Service Director
- Expand Application Manager
- Select APS Catalog
- Select the “Application” field and search for ‘SmarterMail\*’
- ‘SmarterMailAPS’ package should appear in the list
- Check the box next to the Application column and click “Import Package”
- On the next screen click “Import Packages” and the package will be scheduled for importing

## Configuration

This covers the configuration of the SmarterMail APS package after it has been installed/imported into the PoA system.

### Resource Types

Resource Types are used to define activation parameters, which are:

- General package settings
- Global settings
- Default settings
- Services

### Creating an Application

The application resource is the crucial part of setting up the SmarterMail APS package. This defines the global settings that are used by each application service.

- Expand Service Director
- Expand Application Manager
- Select Applications
- Select the “Application” field and search for ‘SmarterMail\*’
- The results should yield the ‘SmarterMailAPS’ package that was installed prior (where applicable)
- Select the ‘SmarterMailAPS’ package
- Click the “Resource Type” tab
- Click “Create”
  
- Select Application from the Resource Class list
- Give it a name (Ex: SmarterMail App) & Description, click “Next”
- Fill in the following fields under the “Global application settings” section:
  - SmarterMail public site URL
  - SmarterMail installation host
  - SmarterMail installation IP
  - Primary System Administrator Login
  - Primary System Administrator Password
  - Primary MX
- Click “Next”
- Uncheck “Automatically provision application,” click “Next”

- Check “External Provisioning,” click “Next”
- Click “Finish”

### **Creating an Application Service**

The application service is what defines the defaults for each service that used by the SmarterMail APS package (domains, mailboxes, etc) .An application service will have to be created for each service that you want to provide.

- Navigate to the “Resource Types” section of the SmarterMail APS package. Follow the same steps when creating an application resource to get to this section.
- Click "Create"
- Select Application Service from the Resource Class List
- Give it a name (Ex: SmarterMail App Domain Service) & Description, click “Next”
- Select from the list of services the application service will be (Ex: SmarterMail Domain Service)
- Provide default values for this resource, then click “Next”
- Priority can be any number, so let’s go with 1, Click “Next”
- Click “Finish”

Again, these steps must be repeated for each application service that is offered with the package.

### **Service Templates**

This covers the creation of service templates for the package. A service template defines both subscription limits as well as what services are provided when using the package.

#### **Creating a Service Template**

- Expand Service Director
- Expand Provisioning Manager
- Select Service Templates
- Click “Add New Service Template”
- Provide a name & description
- Uncheck “Autoprovisioning”
- Set “Type” to Custom
- Click “Next”
- A list of available Resources will be shown
- Select the Resource Application that was created earlier as well as any of the Resource Application Services that were just created. For example, "SmarterMail App" and "SmarterMail

### App Domain Service"

- Click "Next"
- Set the limits of the service template
- Check Unlimited for the Resource Application (Ex: SmarterMail App), Application Backup and Application User
- Resource Application Services (Ex: SmarterMail App Domain Service) can be either set to unlimited or can have a limit applied to them
- Home Visibility is an optional field that can be checked, if desired, that provides usage information for the user when they log in
- Click "Next"
- Review your settings, then click "Finish"

## **Subscriptions**

This covers the how to apply subscriptions to customers using the service template that was created early.

### **Creating a Subscription**

- Expand Service Director
- Expand Provisioning Manager
- Select Service Templates
- Select the "Service Template" field and search for, then select, the service that was created prior
- Click "Activate" under the General section of the service template (the service template must be activated prior to adding a subscription)
- Click "Subscriptions" tab
- Click "Create New Subscription"
- Select the "Company" field and search for the company that will be subscribing to this template, then select the company from the search results
- Set additional resource limits for the subscription if desired (subscriptions will inherit the values from the service template by default)
- Click "Next"
- Review the settings and click "Finish"

The company selected now has the ability to use the SmarterMail APS package.

## **Package Setup and Usage**

This covers the steps required before provisioning and usage of the package can be conducted.

## Setup

### Creating a Domain

- Expand Operations Director
- Expand Customer Manager
- Select Customers
- Select the "Company" field and search for a company, then select the company from the search results
- Click the Resources tab
- Click "Add New Domain"
  
- Provide a domain name (e.g., example.com)
- Check "Set Registrar Status to Ready"
- Select the SmarterMail APS subscription from the "Subscription" dropdown
- Click "Next"
- Click "Next" again
- Review the settings and click "Finish"

A domain is required to be associated with the package so the domain can be properly added with the package. After a domain has been added, the package can start being used.

## Usage

This covers an example usage of using the package by creating a domain as a customer.

### Login

- Expand Operations Director
- Expand Customer Manager
- Select Customers
- Select the "Company" field and search for the company, then select the company from the search results
- Click "General" tab
- Click "Staff Members" and a list of staff members will be shown
- Click "Login as Customer"

### Configure

- Click the "SmarterMailAPS" link towards the bottom of the page
- Click "Add New"
- Fill in the following fields:

- Display Name
- Check “Login in existing domain”
- Fill in the user name
- Fill in the password (Generate New Password can be used to generate a random password for this account)
- Click “Next”
- If “Display Name” was supplied from the previous step, the System Administrator’s first & last name will be filled in. If not, it is optional to provide a first & last name
- Click “Next”
- Review the settings and click “Finish”
- The account and the domain will be scheduled for provisioning

The steps when configuring each service are the same for each service the package provides. Simply fill out the required fields for each service and follow through each wizard.

## Website Panel Module for SmarterMail

### Package Description

WebsitePanel is a multi-tenant, enterprise hosting automation tool with support for private cloud servers. It enables you to centralize the management of your hosting infrastructure and share resources across multiple customer accounts. This product can be used with SmarterMail and SmarterStats to deploy users and domains/sites from a single interface.

### Package Goals

The SmarterMail WebsitePanel module allows the administrator to create, remove, and manage domains, users, mailing lists, and aliases. User settings that can be modified include the ability to change mailbox size, manage passwords, set domain admins, manage autoresponders and mail forwarding. Advanced settings and server settings are managed from within the SmarterMail Domain and / or System Administrator logins in SmarterMail itself. Server defaults will want to be configured prior to integrating with WSP.

The SmarterStats WebsitePanel module allows site and user creation, and allows the ability to link directly to the site to view reports as a particular user. Server and site/domain settings will need to be managed on the server itself.

### Prerequisites

- You will need to be registered with WebsitePanel in order to access the download links
- Microsoft.NET framework 4.0 (ensure this is registered within IIS)

- IIS 6.0 or higher
- Microsoft SQL Server, installed locally or hosted remotely
- Licensed install of SmarterMail 9.x or higher and / or SmarterStats 7.x or higher

## Configuration

Once all of the prerequisites are met, configuring the modules is fairly straightforward. The steps below cover adding a new server to your environment, creating a hosting plan, and creating a customer account to utilize the server resource that was set up.

### Adding a Server

When you're ready to add a new server, ensure the server password is configured in the Website Panel installer.

- Navigate to Configuration -> Servers
- Click Add Server
- Enter in the Server Name, the URL, and Server Password (this is configured in the WebsitePanel installer)
- Server URL: http://127.0.0.1:9003 (default)
- Enter the password configured during the initial setup
- Ensure "Check for installed software" is selected
- SmarterMail and SmarterStats should be picked up during the installed software check. These services will need to be configured separately, however. Navigate to Configuration -> Servers. You should see your server, and the services associated.
- Click on SmarterMail 10.x +
- Set the SmarterMail web services URL
- Select a public IP address
- Set the Admin Login
- Configure any additional options
- Click Update
- You should be back in the server configuration page.
- To configure SmarterStats, scroll down and Click SmarterStats 5.x +. Otherwise, skip to step 5
- Set the SmarterStats web service URL
- Specify admin credentials
- Select the SmarterStats server
- Click Update
- You should now have a server set up for the particular service resource.

## **Creating a Hosting Plan**

Below you will find the steps for creating a hosting plan that uses the particular server and service resource you've created.

- Navigate to Account Home
- Click on hosting plans in the left hand menu
- Click Create Hosting Plan
  
- Set the Plan Name
- Set the target server to your desired server with the particular service resource attached
- Set your quotas
  
- Check System, then set desired options
- Check Websites (Only necessary for SmarterStats) , then set desired options
- Check Mail, then set desired options
- Check Statistics, then set desired options
- Click Save
- You should now have a hosting plan set up that uses the particular service resource.

## **Creating a Customer Account**

Below are the instructions for creating a customer account that will utilize the resource and hosting plan created.

- Navigate to Account Home
- Select Customers from the left hand menu
- Click Create user
  
- Enter in a Username and Password
- Fill in all other required information
- Click Create
- It will bring you to a new window with an option to create a new hosting space. Click Create hosting space to begin the process
  
- Select your hosting plan that this will apply to, fill out required fields and select Create Space
- After the space has been created you will need to create a domain for your users within SmarterMail
  
- Sign into WSP with the newly created user
- Navigate to Domains, and select Add Domain
- Set the domain name, ensure create website is checked (for SmarterStats)

- Leave the other checkboxes unticked
- Click Add Domain
- Using the hosting space menu on the left, navigate to Mail -> Accounts, and select Create Mail Account
- Fill in the email address, and select the domain that was created in step 6
- Enter a Password
- Set the Mailbox Size Limit
- Specify customer information, and a signature if necessary
- Enable\Disable Autoresponder
- Enable\Disable Mail forwarding
- Click Save
- This will prompt WSP to call the SmarterMail web services to create the domain, and the newly created user. I have not found a way to purely add just a domain to SmarterMail using WSP. A user must be created to prompt the domain creation
- Using the hosting space menu on the left, navigate to Advanced Web Statistics and click Add Statistics Site
- Select the website that was created in step 6c, the site ID will populate on it's own once the site is created
- Specify your users, and passwords
- Click Add Site
- The statistics site will then be added into SmarterStats. You can view the site statistics by navigating to Advanced Web Statistics and click View Statistics, you will automatically be signed in as the user.
- You should now have a new customer set up that can take advantage of your hosting plan that uses SmarterMail.

## Concepts

### **Roles of SmarterMail**

SmarterMail is a feature-rich Windows mail server that brings the power of enterprise-level functionality and collaboration to businesses and hosting environments. SmarterMail is powerful enough to be used as a complete mail system that performs all of the following roles from a single server. SmarterMail installations can also be used to perform specific functions on mail networks to enhance an existing infrastructure or to gain performance—whether you are running SmarterMail as your primary mail server or to support another mail server that is having difficulty performing under the current load.

As you will discover, SmarterMail can be used to fulfill a variety of roles that can be deployed for little to no cost. Adding SmarterMail in one—or several—of these roles will increase the stability and longevity of your email system.

#### **Provide a Feature-rich Primary Mail Server with a World-class Interface**

Use SmarterMail as your primary mail server and provide customers with an unmatched email service that includes industry standard connection methods like POP3, SMTP, and IMAP4; multi-language support; and a browser-friendly design. In addition, SmarterMail delivers all of the coordination, communication, and world-class collaboration functionality that you expect through a familiar and intuitive Web interface. Users have access to shared calendars and the availability of their co-workers to schedule appointments. Tasks can be assigned and emails managed 24/7 with accuracy, speed, and security.

#### **Reduce Server Load and Pre-scan Incoming Messages for Spam**

Configure SmarterMail as your incoming gateway server and reduce the load on your primary server. In this role, SmarterMail can manage all incoming SMTP sessions and detect abuse and intrusion attempts. In addition, SmarterMail can also host third-party antivirus and antispam software, such as Declude, Trend Micro Server Protect, or JunkMail, and pre-scan messages prior to delivery to the primary mail server. Best of all, these functions can be integrated at no cost by downloading and installing SmarterMail Free Edition to operate as your incoming gateway server.

#### **Reduce Server Load and Spool Outgoing Messages**

In high-volume scenarios, SmarterMail can reduce primary server load by functioning as your outgoing gateway server to spool outbound messages. One benefit of configuring SmarterMail in this role is that it functions as an effective method to combat blacklisting and can help ensure a quick

system recovery. For example, if one of your IP addresses is blacklisted by an external email provider, you can resolve the issue by changing the IP address of the gateway server or turning off the gateway server until the IP address is removed from the blacklist (providing there are multiple gateway servers set up). In addition, this configuration of SmarterMail can run spam checks on outbound messages to prevent spam messages from being sent to remote servers, thereby reducing the likelihood of a blacklisted IP address. These functions can also be integrated at no cost by downloading and installing SmarterMail Free Edition to operate as your outgoing gateway device.

## **Ensure Up-time with a Backup MX Server**

In the case that your primary mail server goes down, ensure that your users will continue to receive incoming email by setting up a backup MX server. When the primary mail server cannot be contacted, email servers on the Web will attempt delivery to the backup MX server. When the primary server comes back online, the backup MX server will deliver all held email.

## **Use One Server for All of Your Needs**

SmarterMail's unique configuration system allows the flexibility to configure a server to function in a single role or in multiple roles at once. For example, SmarterMail can be to function as both the incoming and the outgoing gateways, which will improve the flow of traffic through your network without large cost increases.

# **SmarterMail and Microsoft Exchange An Administrative Comparison**

## **Who Should Use This Document**

This document provides a comparison of SmarterTools' SmarterMail Enterprise mail server software and Microsoft's Exchange 2010 Enterprise mail server. It is designed specifically for server and system administrators and provides information on the hardware, software and licensing requirements of both products, with an overall cost breakdown in each category.

It is equally important to review the end user experience for both products as well. Therefore, please review the white paper SmarterMail and Microsoft Exchange 2010: An End User Comparison for a more complete feature-by-feature comparison of both products from the end user's point of view.

For the purpose of the comparison in this document the following criteria were used:

- Based on a small to medium business (SMB) utilizing multiple domains, potentially for multiple brands.
- Up to 250 mailboxes populating the mail server. This is simply a user limit for the sake of comparison and in no way infers a maximum user limitation, either within Exchange or

SmarterMail.

- Accommodations for organizations wanting both webmail access as well as organizations wanting a mixture of webmail and standard desktop email clients.
- Mobility using multiple “smart phones” (e.g., Apple iPhone, Samsung Galaxy SIII / Note 2, LG Optimus 9, Nokia N-900) and other mobile devices (e.g., Apple iPad, Android tablets).
- Complete synchronization across a variety of mobile and desktop environments.

## Overview

At first glance, comparing a mail solution against the historical significance of Microsoft’s Exchange Server may seem like a rather daunting task. After all, a study in 2008 estimated that a full 65% of workers worldwide were using Microsoft’s email server. However, at that time there was a lack of competitive products that offered comparable functionality. That is no longer the case, and once you start peeling layer upon layer of complexity away from the Exchange infrastructure, vulnerabilities begin to appear. This is especially true when you look at Exchange from an administrative standpoint.

With that in mind, there are several areas where SmarterMail Enterprise far surpasses Exchange Server 2010—areas that are of vital importance to small businesses and server administrators alike:

- Licensing — All of the software required comes with a cost—and that can be high on the list of priorities when planning out a new system or even a migration/change of an existing system.
- SmarterMail has a much smaller footprint and lower cost of entry and, as you’ll see, a lower long-term cost as well.
- Requirements and planning — There are hardware and software considerations when planning to build out an email and messaging platform. Exchange is well known for its complexity and difficult planning and installation requirements.
- SmarterMail offers a simpler set of requirements and nothing more than basic server administration and implementation skills are necessary.
- Management and Maintenance — Once the mail server is installed, someone needs to be able to monitor the day-to-day activity and health of the server, users need to be added or removed, settings need adjusted, and more. Being able to perform these tasks quickly, easily and from anywhere is extremely important.
- SmarterMail provides a simple and understandable set of management and maintenance tools built into an “access anywhere, at any time” web-based interface.
- Backups/Restores — Storage and recovery capabilities of online communications is hugely important. What options are there and what are the costs?

- SmarterMail can be backed up and restored using standard backup and recovery technology. No further investment in specialized hardware or software is needed.

## Comparison of Licensing

From a licensing perspective, a clear and concise licensing structure makes it much easier to plan out both an initial installation as well as any migration. Taking this into account, is it better to require an all-in-one licensing model or one that requires virtually each individual piece to have its own licensing requirement?

Comparison based on 250 Mailboxes		
	SmarterMail Mail Server	Microsoft Exchange™
Base License	\$ 499.00	\$ 3,970.00
Client Access License	N/A	\$ 25,000.00
Anti-Spam	\$ 249.00	Included*
Anti-Virus	\$ 249.00	Included*
ActiveSync**	\$ 799.00	Included
Hardware	\$ 1,998.00	\$ 1,998.00
Upgrade Protection	Included***	\$ 1,998.00
Employee Expense	Low	High
<b>Total:</b>	<b>\$ 3,794.00</b>	<b>\$ 32,953.00</b>

\*Antispam and antivirus are part of Microsoft's Forefront Security Suite as part of the Enterprise CALs

\*\*Exchange ActiveSync (EAS) comes standard with Exchange. Pricing shown for SmarterMail is for 200 licenses. You can scale EAS licensing to meet your needs, separate from your SmarterMail license.

\*\*\*SmarterTools' upgrade protection is included with every new license purchase and provides customers with major upgrades at no cost for 12 months.

## Server Licensing

First, let's look at simple server licensing costs. This is licensing solely for the mail server software that is installed. Remember, for the purposes of this comparison we are going to look at a business that requires up to 250 mailboxes.

- Exchange 2010 — Enterprise is \$3,970.00.
- SmarterMail — Enterprise licensing for 250 mailboxes is \$499.00.

## **Client Access Licensing**

A CAL is simply what the name implies: it's a license required for a client—whether that is a user or a device—to access a server.

- Exchange 2010 — Requires user or device CALs, depending on how or what is connecting to the Exchange server.
- A user CAL is generally defined as a license for the person connecting, regardless of whether they connect via Microsoft Outlook, webmail or mobile device. User CALs are approximately \$42.00 each.
- A device CAL is defined as a license for each device that is connecting (e.g., desktop, mobile device, etc.). Device CALs are approximately \$68.00 each.
- SmarterMail — Does NOT require individual licensing for each person or device that accesses a mailbox. In fact, you can buy a license that will accommodate the number of mailboxes you need—plus give you some room for growth. Whether you need 250 mailboxes, 500 mailboxes, 1,000 mailboxes or even an unlimited number, there is a licensing model to fit your need (SmarterTools even offers a fully-functional Enterprise license for 10 mailboxes as a free trial).

## **Employee Expense**

Employee expenses are somewhat subjective. With Exchange you have a very complex infrastructure, requiring multiple server roles, high-end hardware and software, and extensive project planning and management. On the other hand, SmarterMail offers a much simpler installation requirement and footprint. On these merits alone, the employee expense incurred with just the installation of Exchange—not to mention the day-to-day management and maintenance of it—logically dictates that a very experienced and well-trained individual or group is required. This, in turn, equates to a higher cost.

With SmarterMail, an existing employee with a good grasp of server technologies and management skills is all that is required. That's how SmarterMail was built: with ease of use and ease of management in mind.

## **Comparison of Requirements and Planning**

Rather than looking at the overall feature set of both products, let's take a close look at the requirements of both Exchange 2010 and SmarterMail.

### **Hardware**

- Exchange 2010 — Requires 64-bit architecture. While not an issue at first glance, this restriction may require separate servers for each server role in the Exchange setup. This can be

problematic for businesses wanting to use existing legacy hardware or that lack capital to invest in new hardware. Also, Exchange requires several server roles, managing various parts of the platform. This could mean the need for multiple servers.

- SmarterMail — Has a very acceptable minimum set of hardware requirements. This means businesses can run on either 32-bit or 64-bit hardware. As there are no server roles to configure, a single server may be all that is required. In fact, SmarterMail can run on an existing server in a dual-use role. That is, SmarterMail can run on a Web server or file server and doesn't require its own hardware to run.

## **Software**

- Exchange 2010 — There is, of course, mail server licensing (either Standard or Enterprise) to consider. Additionally, Exchange requires Client Access Licenses (CALs) for each mailbox/user and in order to get security and antivirus, Enterprise CALs are required - at a substantially higher cost. And all needs to run within an active directory tree. Finally, Exchange 2010 must be run on a 64-bit version of Windows Server 2008.
- SmarterMail — A simple purchase of the mail server is all that is required. Antivirus and antispyware are included with SmarterMail Enterprise, but there are options to increase coverage with Message Sniffer and Cyren. In addition, SmarterMail does NOT require a 64-bit version of Windows Server, making it incredibly easy to set up on an existing 32-bit or 64-bit server.

## **Planning the Architecture**

- Exchange 2010 — As mentioned, Exchange has multiple different server roles (edge transport, hub transport, mailbox, client, etc.) running within an active directory tree. As noted earlier, each role may require separate servers. That means extensive planning is required, from active directory on up to actual Exchange server installation.
- SmarterMail — Considering hardware and software requirements, one server can act as the mail server and also run any necessary antispyware and antivirus add-ons. Furthermore, SmarterMail also does not require active directory, although it can integrate into an active directory tree so single-authentication can be used throughout an existing infrastructure. It should be noted, however, that the lack of an active directory requirement may reduce the time needed to plan out an implementation and installation strategy.

## **Management and Maintenance**

With any software implementation, system and server administrators are challenged with keeping tabs on the mail server(s) hardware and software. Furthermore, there are day-to-day tasks, things like user management, domain management, management of blacklists and content filters, and much more.

## **Management and Maintenance**

- Exchange 2010 — As Exchange runs on a server OS, the majority of management and maintenance of the server has to be performed on the server. That means administrators generally have to remote or console into the server. In addition, management occurs via an Exchange tool that plugs into the Microsoft Management Console (MMC). If an administrator is offsite, these connections must occur through secured VPN. All of this can decrease the connection speed and therefore increase the time it takes to complete even routine maintenance tasks. Besides, it's a somewhat convoluted and complex setup.
- SmarterMail — SmarterMail offers a powerful and extremely accessible web-based administrative front end. With the ability to set up different roles (e.g., system administrators vs. domain administrators), plus the ability to set up multiple, different system administrator accounts (so no one has to share logins, which results in better tracking and change management) SmarterMail administration is fast, is easy, and it can be accomplished on-site or remotely using any standard browser. SSL connections are available, and you can even limit access to the admin area by specific IP, further enhancing security. And unlike the Exchange plug-in for the MMC, SmarterMail's administrators have access to numerous reports, from incoming/outgoing spam to server health, disk space usage to abuse detection.

## **Learning Curve**

- Exchange 2010 — When looking at everything that goes into planning an Exchange installation, there's no doubt the people planning and carrying out the installation are professionals. This, in turn, means they significantly factor into the costs associated with that installation. In addition, there are possibly increase employee costs for the level of individual necessary to manage and maintain an Exchange infrastructure. Most system and server administrators for Exchange have years of experience and untold hours of training and product-specific education under their belts. Therefore, they won't come cheap.
- SmarterMail — SmarterMail runs in a very simple, very easy to manage and maintain environment that is not unlike any base server installation. Therefore, a company can get by with existing staff and existing system and server administrators. The learning curve is much easier to manage with SmarterMail as standard server administration knowledge is about all that is required.

## **Backups and Restoration**

Your data is only as good as its most recent available backup. And even then, a backup isn't of any use unless it is recoverable and restorable. However, backups and restoration of data do not have to be complex and expensive initiatives.

- Exchange 2010 — Exchange can be backed up with most existing backup technologies. However, its one big exemption is that Exchange requires a separate and specialized backup agent in order to be able to back up mail files. Anyone who has priced these agents out knows this an expense to them, and in many cases the expense can be substantial.
- SmarterMail — SmarterMail can be backed up with any existing backup technology and does NOT require the use of a separate, specialized agent. This reduces the costs of backup and restoration and also is one less thing for administrators to manage and maintain on the mail server.

## Summary

When you look at all of the differences between Exchange 2010 and SmarterMail a few things really stand out:

- The planning necessary for an implementation of Exchange 2010 is far more detailed and involved than what is necessary for an installation of SmarterMail. With Exchange, you don't simply set up a Web server and a database. Things like active directory trees need to be considered, plus the necessity of various server roles—how to configure each role, figuring out what can you combine into a single server, planning how to configure the server connections and interactions, etc. Complexity is Exchange's strong point; simplicity and ease-of-use are SmarterMail's.
- Licensing is generally a sore spot with most software implementations. However, it's extremely apparent that you get just as much with SmarterMail as Exchange, but with substantially less payout. Looking at the comparison tables alone demonstrates a 5X to 11X savings with SmarterMail over Exchange.
- Requirements, both from a hardware and software standpoint, again point to SmarterMail being a much wiser investment than Exchange. Minimal server OS concerns, no active directory (unless you need it), and much more flexible hardware options all place SmarterMail above Exchange.
- When looking at maintenance and management, plus the learning curve required, SmarterMail again gets the nod. Without the need for lengthy training or education, and simple server administration experience all that is required, SmarterMail is easily administrated by existing employees, again saving time and money.

## **Trust and Availability**

There's no doubt Microsoft has the name. They've been around a long time, and have a long history of building quality software and being on the leading edge of technology, especially when it comes to providing a robust and feature-rich email solution. However, becoming one of the largest, if not THE

largest, software and services company doesn't come without some sacrifice. These sacrifices tend towards offering reliable, accessible access to support and customer service, at least affordable access to these critical needs.

That's where SmarterTools comes in.

Over the last eight years SmarterTools has grown to over 15 million users, but still sees each user as important. They have grown through investment in products and development versus in advertising and marketing, building SmarterMail into one of the most popular and respected mail servers on the market. They realize how safe, secure and reliable communication is vital to each and every user of their product. That's why SmarterTools offers services that cater directly to their customer base:

- Access to LIVE tech support, 24/7/365
- Upgrade and installation services
- A popular, free public community to interact with support and fellow users
- Responsiveness to customers that often leads to product enhancements

While it may be true SmarterTools doesn't have the name recognition as Microsoft, what is certainly not up for debate is SmarterTools' commitment to their customers, to their products, and to their desire to create the most reliable and secure mail server solution on the market.

Taking all of this into consideration, it may not be a question of "why move to SmarterMail from Exchange," or "why choose SmarterMail over Exchange," but more a question of a "why not ?" 1 <http://www.ferris.com/hidden-pages/ferris-research-completes-most-comprehensive-survey-of-business-email-systems-to-date/>

## **SmarterMail and Microsoft Exchange An End User Comparison**

### **Who Should Use This Document**

This document provides a comparison of SmarterTools' SmarterMail Enterprise mail server software and Microsoft's Exchange 2010 Enterprise mail server. The comparison is from the end user's point of view.

It is equally important to review the system and server administration experience for both products as well. Therefore, please review the white paper SmarterMail and Microsoft Exchange 2010: An Administrative Comparison for a more complete comparison of both products from the administrative point of view.

For the purpose of any comparisons in this document the following criteria were used:

- Based on a small to medium business (SMB) utilizing multiple domains, potentially for multiple brands.
- Up to 250 mailboxes populating the mail server.
- Accommodations for organizations wanting both webmail access and standard desktop email clients.
- Mobility using multiple “smart phones” (e.g., Apple iPhone, Samsung Galaxy SIII / Note 2, LG Optimus 9, Nokia N-900) and other mobile devices (e.g., Apple iPad, Android tablets).
- Complete synchronization across a variety of mobile and desktop environments.

## Overview

Email is the cornerstone of modern communication. In fact, even after the growth in various forms of social media like Twitter and Facebook, email is still considered THE "Killer App." As such, it is of vital importance that email communication is as secure, stable, powerful and versatile as possible. With SmarterMail, you get tools to not only make your email experience more enjoyable, but safer and more secure as well.

In addition to protecting users, SmarterMail offers a flexible and versatile set of tools for users to access email. These tools include an advanced webmail interface that can be used with most popular Web browsers, synchronization protocols such as CalDAV, CardDAV, Microsoft Exchange ActiveSync and Exchange Web Services for mobile devices like the Galaxy S4 and Apple's iPad, and integration with desktop clients such as Microsoft Outlook, Microsoft Outlook for Mac, Apple Mail and Mozilla Thunderbird.

Of course, there are other products that do the same; Microsoft's Exchange is one example. However, once you start comparing the two products it is evident that SmarterMail Enterprise far surpasses Exchange Server 2010 in many areas:

- Collaboration — This means the ability to share things like your daily calendar, your contacts, and even your tasks. From a calendar standpoint, equally important is the ability to set up meetings and check the availability of your friends and colleagues.
- SmarterMail contains virtually identical collaboration tools as Microsoft Exchange and adds a few extra, such as file storage and file sharing.
- Security and Antivirus — Computer/infrastructure security from online threats is a big concern, so this section discusses included options as well as third-party integration.
- SmarterMail offers powerful antivirus measures without the need to purchase third-party add-ons (although you can, if desired).
- Antispam — According to Symantec's MessageLabs, spam is responsible for over 88% of all

email. Options to combat these numbers, both included as well as third-party integration, are discussed in this section.

- SmarterMail offers industry-standard antispam measures upon install without the need to purchase third-party add-ons (although you can integrate third-party solutions, if desired), with over 97% of spam blocked with a default installation.
- Synchronization and Mobility — According to a Pew Internet study 1, 26% of adults own an e-reader, whereas 31% own a tablet computer. In addition, 55% access the Internet on a mobile phone. With that kind of growth and reach into everyday life, what are the options in Exchange and SmarterMail?
- SmarterMail offers a number of ways to sync with your mobile devices and actually beats Exchange in some cases by supporting multiple synchronization options.
- Access to Information and Email Migration — Having access to information is crucial in today's fast-paced environment. You need to know what's going on in the world, you need to keep track of contacts and your interaction with them, and you need to know your own status within your organization: your usage stats, your available space, both for your email as well as for your files, and much more.
- SmarterMail offers a number of “push” type technologies that give you the ability to subscribe and manage RSS feeds, reporting options of virtually all of your email usage, detailed contact information, and a quick and easy way to migrate your files, contacts, calendars and emails into SmarterMail—all within the robust webmail interface, giving you access to this information anytime, anywhere.

## Collaboration

Collaboration is simply the ability to share information with friends and co-workers, from your calendar to your contacts. Additional features include the ability to schedule appointments with people, check their free-busy availability, reserve conference rooms, modify shared tasks, share contacts and “virtual cards” (vCards) and more.

### Shared Calendars, Contacts, Tasks and Notes

- Exchange 2010 — One of the more notable and powerful features the Microsoft introduced with Exchange is the ability to share calendars, contacts, notes and tasks with other people in an organization.
- SmarterMail — SmarterMail also offers sharing of calendars, contacts, tasks and notes. However, SmarterMail offers a way to store documents and other files and link to those in emails and tasks so others can access them as well. As an aside, while you can share links to the files, you don't have to, making SmarterMail's file storage feature even more versatile.

## Security and Antivirus

Everyone wants their email to be secure—secure from virus infection, free from phishing attempts, and free from malware and dangerous attachments. Additionally, no one wants their mail servers used for spamming or for attacking others as that can lead to untold hours of downtime once unwanted activity is detected and dealt with—both internally and by those affected.

### Antivirus

- Exchange 2010 — Does NOT contain any antivirus protection out of the box. That means that it must be added after the fact and can end up costing more money. At the very least, the Enterprise Client Access Licenses (CALs) are needed in order to use Microsoft's Forefront Security Suite.
- SmarterMail — Each installation of SmarterMail contains industry standard antivirus protection through Clam AV. This is at NO EXTRA COST to users. SmarterMail also offers the ability to add in a number of other antivirus applications and services, including Cyren Zero-hour Antivirus.

### Other Security Features

- Exchange 2010 — Exchange offers the ability to send/receive email using Secure Socket Layers (SSL), offers active directory authentication (actually, active directory is required for Exchange), and SMTP authentication by domain. This latter option means that a user must provide an authenticated username and password in order to send email from the server.
- SmarterMail — SmarterMail includes all of the features listed above, but also takes things further by offering email administrators a large number of whitelisting/blacklisting features, brute force detection, automatic denial of service (DoS) prevention, automatic harvest attack prevention and more. This is an added layer of security that protects users from unwanted events hampering communication.

## Antispam

Spam is, without a doubt, the scourge of the internet. In 2012, researchers at Microsoft and Google estimated that spam costs society up to \$20 billion, a figure comparable to the GDP of Bolivia. 4 . Factor in the time and money spent by people during their off hours, and that number can grow significantly.

### Available Antispam

- Exchange 2010 — Just as with antivirus, Exchange does not offer any antispam protection out of the box for a user's inbox. It requires a third-party solution or Enterprise CAL. That's not to say Exchange doesn't offer antispam measures for the server and for sending email (things like

domain keys and DKIM, trusted senders, SPF records, etc.).

- SmarterMail — Similar to its antivirus protection, SmarterMail offers industry-standard spam measures on a variety of fronts. For example, SmarterMail supports more than 24 separate industry black lists as well as SPF and DKIM. In addition, SmarterMail offers further protection through a proprietary pattern matching engine built upon the SpamAssassin technology and support for remote SpamAssassin servers at no additional cost to end users. SmarterMail also supports Message Sniffer and Cyren Premium Antispam, which can be included for a minimal yearly license fee.

## **Mobility and Synchronization**

With more and more of today's workforce occupying home offices or finding themselves on the go, having an email system that can not only accommodate mobile devices—beyond simply smartphones and including iPads and Android tablets—is essential. In addition, people no longer just text or email each other, they share photos and documents as well.

### **Mobility and Synchronization**

- Exchange 2010 — Exchange ActiveSync (EAS) is a Microsoft technology that is built into Exchange, giving users on the domain the ability to share contacts, calendars, notes and tasks. In addition, Exchange email can be accessed from a variety of email clients like Outlook, Outlook Express, Entourage and more.
- SmarterMail — SmarterMail also supports Exchange ActiveSync as an optional add-on. However, SmarterMail also supports a variety of open source synchronization technologies like SyncML and specific contact and calendar protocols like CardDav and CalDav (for most Apple products, as well as third-party support for Android and upcoming support on Windows Phone). Therefore, while SmarterMail supports EAS as a best-in-breed paid add-on, it may not be required in some situations. SmarterMail also syncs with a variety of email clients such as Outlook, Entourage and Thunderbird. In addition, SmarterMail's webmail client is extremely robust and offers a fully functional email interface for mobile and remote users that is accessible from anywhere there is an Internet connection.

## **Access to Information and Email Migration**

In addition to email, users expect a single interface for a variety of other communications mechanisms. In addition, transitioning from one mail system to another and the movement of email and contacts can be difficult at best. Both the gathering of information—whether in the form of news feeds or contact information—and the migration of your email communication should be as seamless and pain-free as possible.

- Exchange 2010 — The use of Outlook with Exchange means you have a single source for your RSS reader (for reading subscriptions to blogs and news outlets). The feeds you subscribe to from within Outlook translate to your Web App access as well. However, you can't subscribe to RSS feeds from Outlook Web App—those feeds can only be managed from with the Outlook client. In addition, using Outlook gives you the ability to see a variety of information about your contacts. Again, however, that information is only available from within the Outlook client. Also, what if you wanted to know about your email usage patterns? What about the amount of disk space you used compared to the amount you have available? These reports are not available, either from Outlook Web or from the Outlook client. And what if you wanted to be notified if a particular contact sent you an email? What if you wanted to know when your mailbox reached a certain disk limit? None of that information is available from Exchange. Yes, you can create rules in Exchange and Outlook, but those are for email management, not email notification. Finally, while Exchange itself offers the ability to migrate email accounts from one system to another, this isn't possible for end users and must be accomplished by an administrator.
- SmarterMail — SmarterMail brings power to the webmail interface with the ability to subscribe and manage your RSS feeds right from a browser window. In addition, if you want to know your usage stats, that information is at your fingertips plus information on your traffic stats, POP/IMAP usage, any errors you've received—all of this across any date range that you can manage and set. As for contact info, SmarterMail gives you access to a number of related items when you view your contacts: recent emails plus the total number of emails you've received from that contact, any appointments, and a list of all the attachments you received. As for events, SmarterMail has them: you can set up events on collaboration features, email or even your disk usage. Events let you know when something occurs, so you have the information you want when you need it. Finally there are the migration tools. Once your account is set up in SmarterMail, you have the ability to manage the migration of email to that new account, regardless of whether it is from Gmail, Hotmail or any other POP/IMAP account. The tools are yours to use at your convenience. And don't forget: all of this is available from an access anywhere, at any time browser-based interface. You're not restricted to a single email client that resides on a computer you may, or may not, have access to.

## Summary

When you look at all of the differences between Exchange 2010 and SmarterMail a few things really stand out:

- The collaboration features match on practically a one-to-one basis. Therefore, it amounts to the branding issue—just like people buy Nike shoes over Adidas. The sneakers are practically

identical, but people just recognize the Nike brand since it's associated with so many sports figures.

- SmarterMail offers antispam and antivirus at no additional cost upon installation. While you can use add-on services and applications (like the wonderful products from Message Sniffer and Cyren), there's no need.
- Mobility and synchronization are the future, and SmarterMail is there.
- The information is right there, at your fingertips—from anywhere, at any time. Whether it's information on who has sent you what, or if you need to find that spreadsheet that the CMO sent; whether you want to know when you reach 75% of your disk space capacity or need access to your RSS feeds, SmarterMail offers it all right from your Web browser.

### **Trust and Availability**

There's no doubt Microsoft has the name. They've been around a long time, and have a long history of building quality software and being on the leading edge of technology, especially when it comes to providing a robust and feature-rich email solution. However, becoming one of the largest, if not the largest, software and services company doesn't come without some sacrifice. These sacrifices tend towards giving users access to support and customer service - at least affordable access to these critical needs.

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Taking all of this into consideration, it may not be a question of "why move to SmarterMail from Exchange," or "why choose SmarterMail over Exchange," but more a question of a "why not?"

2 <http://www.message-labs.com/intelligence.aspx>

3 <http://www.pewinternet.org/Reports/2010/Mobile-Access-2010.aspx>

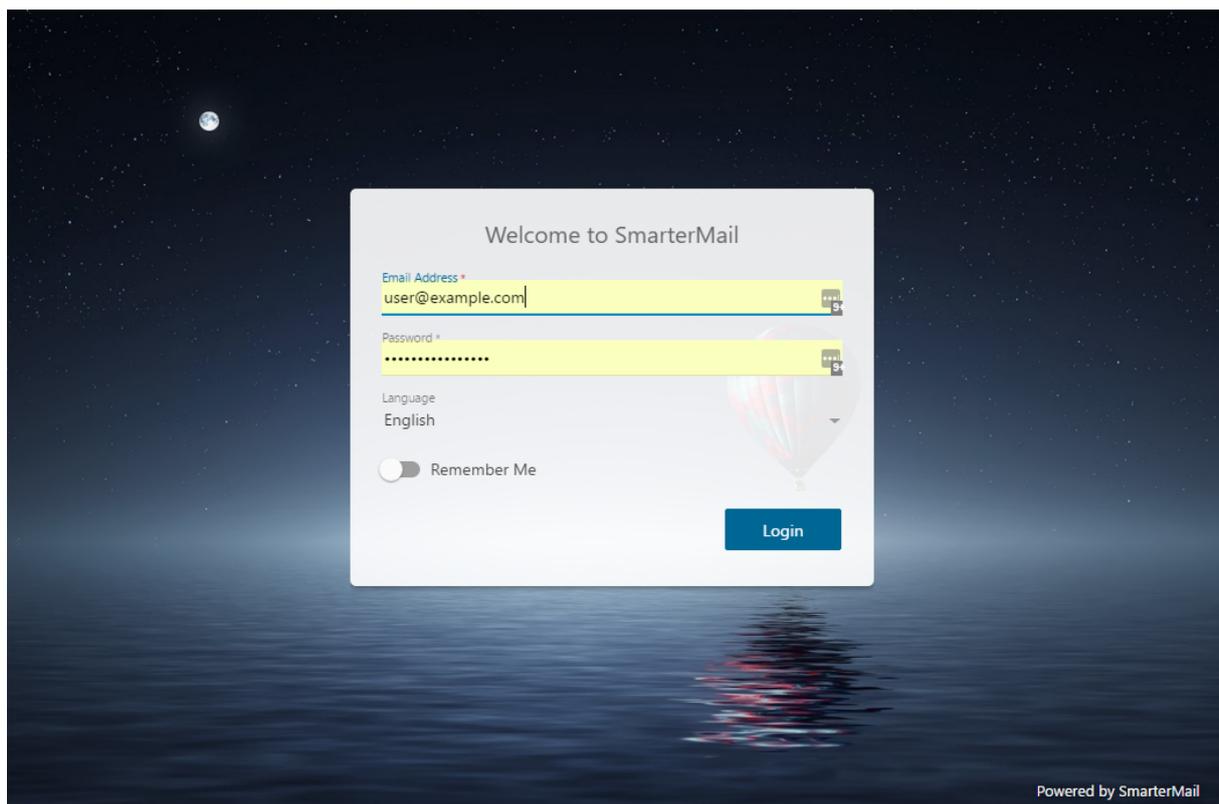
4 The Economics of Spam, Justin M. Rao and David H. Reiley

## [Help for Users & Domain Administrators](#)

### Logging in to SmarterMail's Webmail Interface

SmarterMail users can access SmarterMail using any mobile or desktop web browser in addition to connecting their mailbox to an email client such as Microsoft Outlook for Windows or Mac, Apple Mail or even using the email clients that come standard on most mobile devices. The major advantage of using the webmail interface, however, is that users can log in to their SmarterMail mailbox from any computer or mobile device with internet access, from 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 <https://mail.example.com>. To log in 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 use the Remember Me slider. This will allow SmarterMail to encrypt the email address and password and will automatically log you in the next time you visit your webmail URL. 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 or device.

After clicking the log in button, you will be logged into your SmarterMail mailbox and your inbox will be displayed. If you have trouble logging in or experience issues with your email account, contact your email provider for troubleshooting help. The email provider is usually the owner of the domain or the person who set up your email account for you, like your company's IT person or website 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:

- 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

### **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.

## Browser Notifications

We understand that most SmarterMail users do not work in the webmail interface 100% of their day. To accommodate this, SmarterMail utilizes browser notifications in order to alert users of standard activity within their account. For example, when browser notifications are enabled and you are logged into the SmarterMail web interface, you'll get a pop-up notification at the bottom of your screen when a message is delivered to your inbox, a calendar reminder is triggered or a team chat message is received. Simply click the browser notification and you'll open your new message, go to the live chat, go to a meeting workspace or open your calendar event, regardless of the browser you're using or the application you were currently in.

Note: If you're using a new browser or haven't previously set the notification permissions, you will be prompted to allow this functionality when a new message is delivered to your inbox, a calendar reminder is triggered or a chat message is received. Keep in mind that clearing your browser cookies will make SmarterMail request this permission again.

Appointment reminder notifications that are sent when the SmarterMail web interface is not open will be sent to the Notifications window. Access these notifications by clicking on the Notification icon in the upper right corner of the interface.

To access your user notification settings, log into SmarterMail and navigate to the Settings section. Then click on Account in the navigation pane. In the Notifications card, you can choose which alerts to receive: Calendar reminders, Chat messages, New emails.

## Unblocking Notifications

If "Browser notifications have been disabled in this browser." is displayed in the Notifications card found within your Account Settings, you must first unblock browser notifications for the SmarterMail site in order to enable/disable specific alerts. Please review your browser documentation for the exact steps in unblocking site notifications or refer to the Knowledge Base article, [Unblock / Allow Browser Notifications](#) .

## Sharing Resources: Contacts, Tasks, Calendars, Notes and Email Folders

This feature is only available in SmarterMail Enterprise.

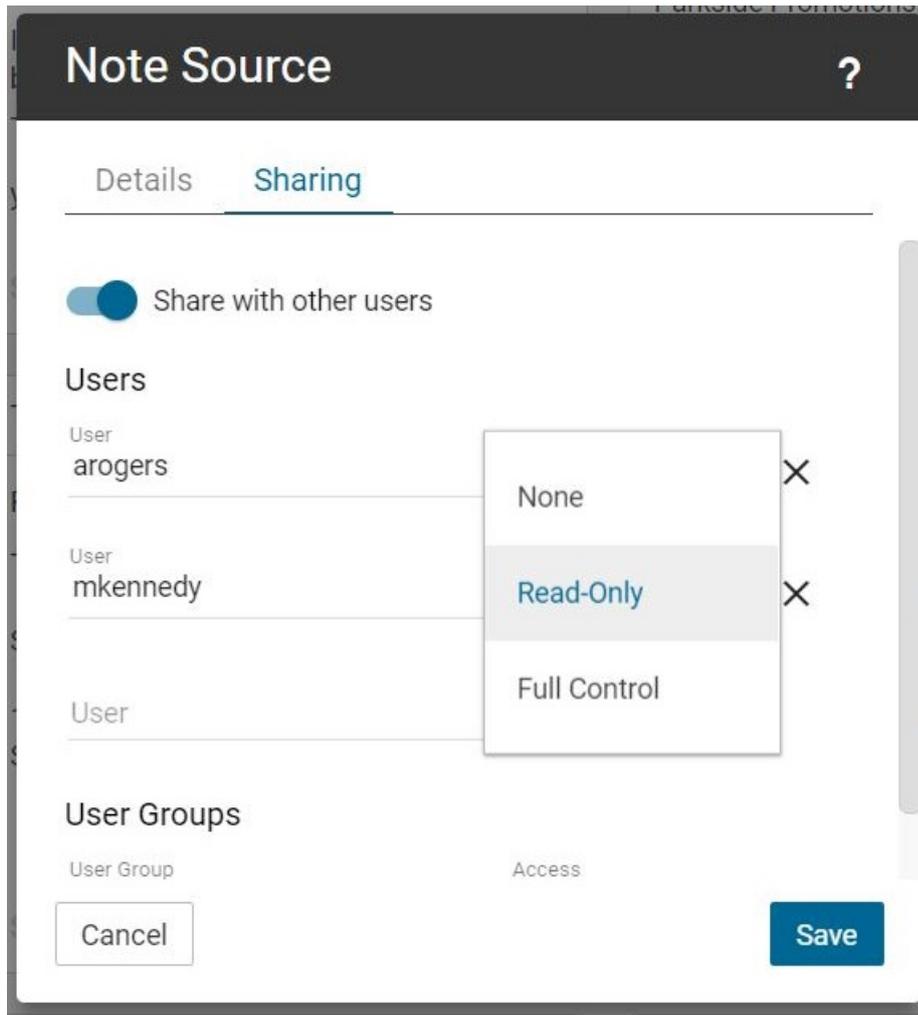
SmarterMail gives users the ability to share a number of things with other people within their organization. Contacts, calendars, tasks, notes and even email folders are all able to be shared between users, making collaboration with your co-workers simple.

The steps take to share items works essentially the same, regardless of what you want to share. That means that sharing notes, tasks, calendars or contacts is handled the same way. So, for the purposes of this help document, we'll look at sharing "My Notes", which is how you'd share YOUR notes with someone else within your organization.

### Sharing My Notes (or anything else)

Sharing a resource is pretty straight forward. First, you need to open the source you want to share. Since we're sharing My Notes, click on the Notes icon and then open the details for My Notes by selecting it. When the modal appears, you'll first see the Details for My Notes, which includes its Friendly Name and details about ownership. However, since we're interested in sharing this with someone else, you'll want to move to the Sharing tab.

The Sharing tab is where you'll enter the username of the person, or persons, you want to share My Notes with, as well as set the permissions level for each of them. The Sharing tab looks like this:



The fields that need to be set are as follows:

- Share with other users - This needs to be enabled in order to share the resource with other users.
- User - This is where you add the user, or users, you want to share the resource with. SmarterMail uses "intellisense" so all you have to do is type the username of the person you want to share with, and then select that username from the intellisense results.
- Access - This is the permission level you're granting to the user you're sharing with. Access levels include:
  - None - This access level acts as a "negater". For example, let's say you have a user group set up for your Marketing Department. However, you don't want to share My Notes with Henry because he ate your piece of cherry pie last week. When you add Full Control access to the Marketing Department user group, you'd add Henry's username under Users and set his access to "None". That way, you're sharing My Notes with everyone in Marketing BUT Henry.
  - Read-Only - This shares My Notes but doesn't allow the person, or persons, you're sharing with to add, edit or delete any of your notes. All they can do is view them.

- Full Control - This access allows others to add notes or edit and/or delete any of your notes. Basically, they use My Notes...or YOUR Notes...just as if they were their own.

As mentioned, while the above is using My Notes, the process for sharing contacts, calendars, tasks and even email folders is essentially the same: you select the item you want to share, add the users and/or user groups you want to share to, and set the Access permissions for each. Once you've saved your settings, the people you've shared with will be able to map those items to their users. For more information, see [Attaching a Shared Resource](#) .

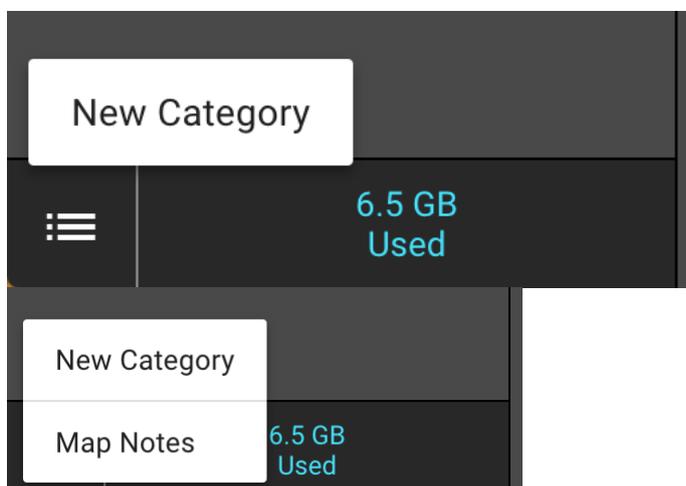
## Attaching to a Shared Resource

This feature is only available in SmarterMail Enterprise.

Once a resource, such as a calendar or contacts, are shared with someone else, that person needs to "Map" it, or attach it to their own account. And, just as with sharing resources , mapping resources works essentially the same, regardless of whether you're attaching tasks, notes, calendars, contacts or an email folder. Therefore, we'll continue our example from the sharing resources article and use Notes as our shared item that requires mapping.

One of the nice things about SmarterMail is that it's easy to tell when someone has shared something with you. In fact, there are 2 ways to find out:

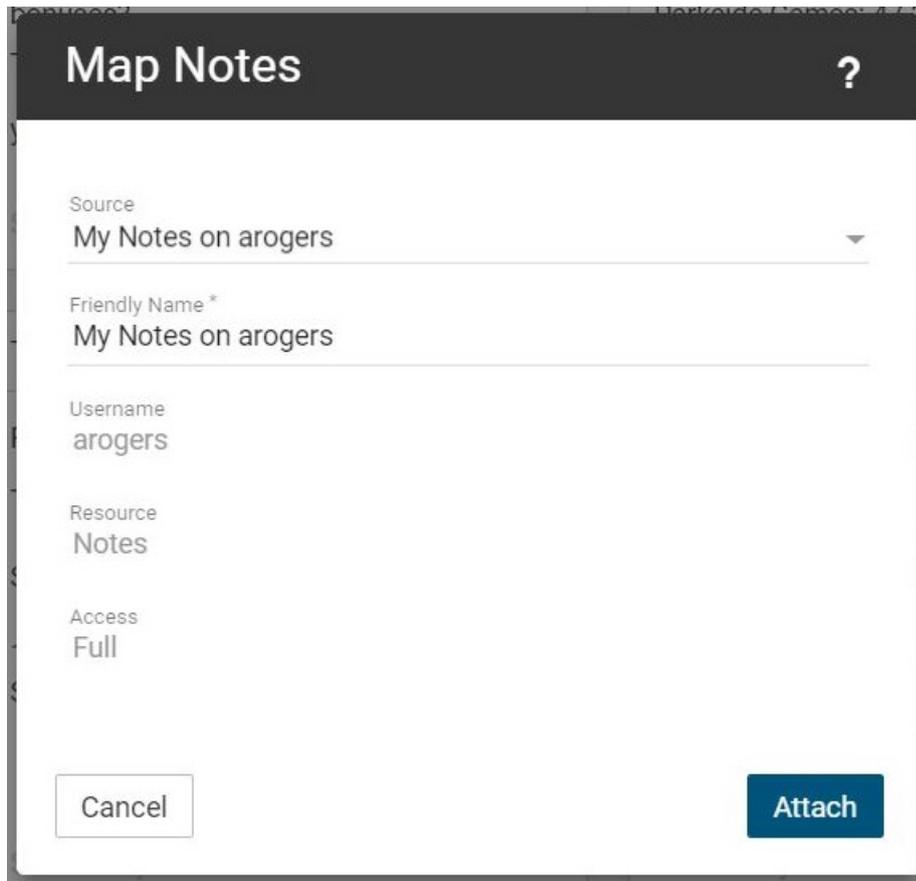
- Notifications - You'll receive a notification when another member of your organization or company has shared something with you. The notification will tell you who that user is and what they've shared.
- Sharing Menu - When an area of the web interface has something ready to attach to, you'll see the "Map [Resource Name]" as an option when clicking the Menu icon. When there's nothing shared, the options when clicking the Menu icon look something like this: However, if there IS something to attach, the option for mapping the resource appears. It looks like this:



As you can see, clicking on that sharing icon brings up a short menu that allows you to actually map to that shared item. In this case, there are Notes shared with this user.

## Attaching To a Resource

When you click on the menu item that appears in the sharing icon, in this case, click on Map Notes, you'll see the following modal:



The screenshot shows a modal dialog titled "Map Notes". It contains the following fields and controls:

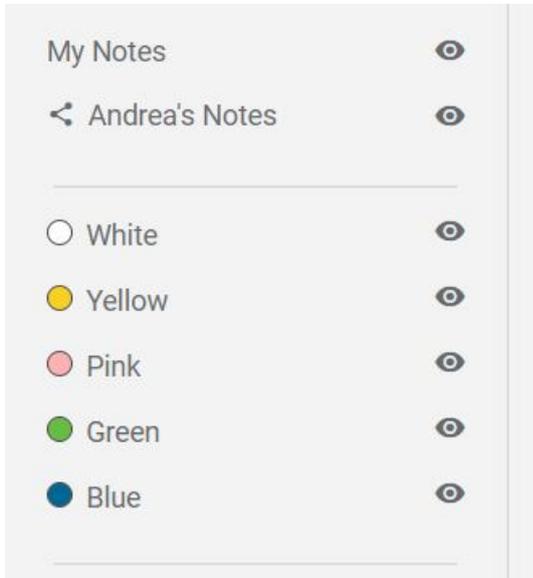
- Source:** A dropdown menu with the selected item "My Notes on arogers".
- Friendly Name \*:** A text input field containing "My Notes on arogers".
- Username:** A text input field containing "arogers".
- Resource:** A text input field containing "Notes".
- Access:** A text input field containing "Full".
- Buttons:** A "Cancel" button on the bottom left and a blue "Attach" button on the bottom right.

Here, you'll see a few items listed:

- **Source** - This is the originating source of the shared item. It's a dropdown, so if several users have shared the resource with you, the dropdown allows you to select which item you want to attach to. NOTE: If multiple items are listed, each needs to be mapped separately.
- **Friendly Name** - This will default to the name of the Source, but it can be changed at any time. For this example, a better Friendly Name might be "Andrea's Notes" or something simpler to understand.
- **Username** - This is the name of the person who shared the resource with you. It can't be edited.
- **Resource** - This is the resource that was shared with you: Notes, Tasks, Calendar, Contacts, etc. As such, it can't be edited.

- Access - This is the access level that the person sharing the item has granted to you. Since they're granting YOU permissions, this can't be edited either.

Once you've selected the Source and made your change to the Friendly Name, you "Attach" that resource to your account. It will then show up in your list of sources:



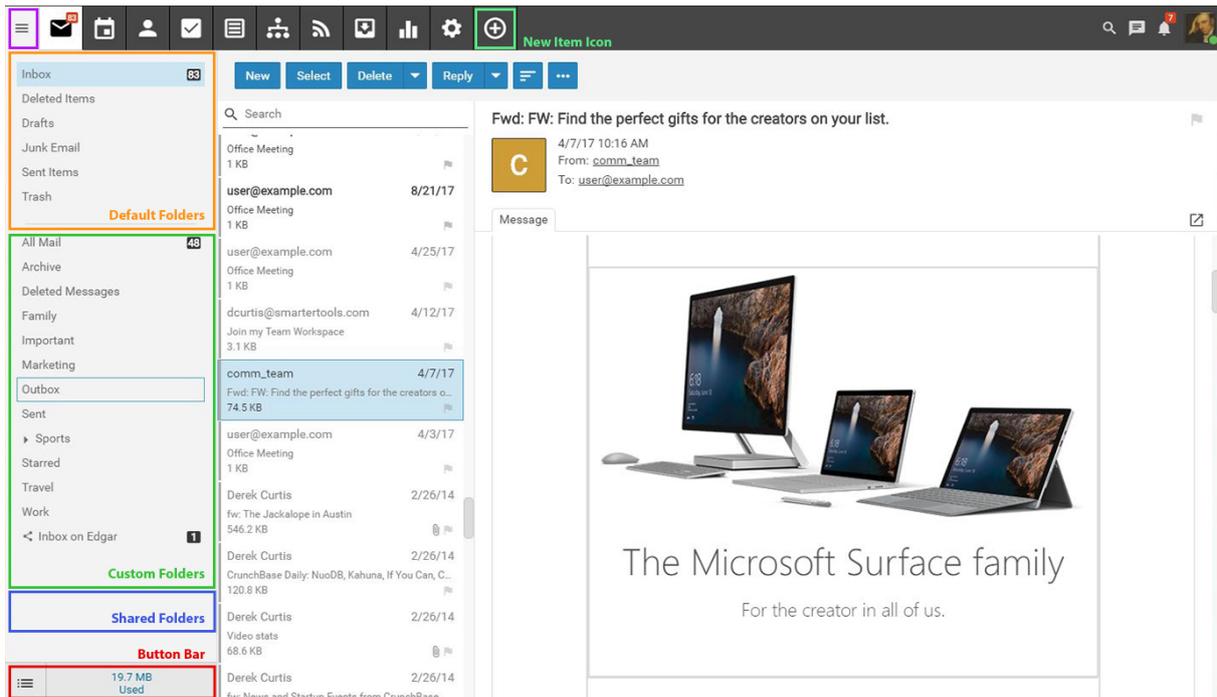
You can now go through and attach other resources throughout your account. As mentioned, while we used the Notes area for our example, above, attaching calendars, tasks, contacts and even email folders is essentially the same. Once you're able to attach one resource, you can attach to others.

## Email

### Email Overview

SmarterMail users can send and receive email messages, view their calendars and create appointments, create or review tasks and more, from anywhere in the world, using any computer or mobile device and a simple web browser. In addition, SmarterMail is fully compatible with any desktop email client such as Microsoft Outlook or Apple Mail, or mobile email, contacts and calendar apps on Android and iOS. To login to SmarterMail simply use the link to the webmail interface login page provided by whoever set up your SmarterMail mailbox. Once on the login page, type your full email address and password in the appropriate fields and click Login .

To help you understand the different areas of the Email section of SmarterMail, we created a simple interface diagram that labels some areas to be aware of.(click for larger image)



## Navigating Email

When you go to the Email section of SmarterMail you'll generally start with your inbox as it's the primary location all new email resides. While you can have content filters set up that route email to different folders or locations, your Inbox is, by default, the starting point for anyone using webmail. Once here, you'll see that the interface is separated into various sections.

### Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

### Button Bar

The Button Bar is available on virtually every page of the webmail client. When viewing your inbox, this is where you do things such as: create new, delete, rename or move folders; Map to shared inboxes or edit mapped folders; create disposable addresses.

### Default and Custom Folders View

The left side of the interface displays your folders. Here, you'll see the default folders listed at the top: Inbox, Deleted Items, Drafts, Junk Email, Sent Items and Trash. These folders are created for every mailbox within SmarterMail.

Below the Default Folders are the Custom Folders that a user creates. If additional folders are embedded within a main parent folder, a down arrow is displayed to the left of that folder's name. Clicking the down arrow will expand that folder and display the additional, embedded folder names.

At the bottom of the All Folders list are any Shared Folders, like a shared inbox. These are denoted by a sideways V shape. Shared Folders are always displayed at the bottom of the folders area.

Read more about [Managing Folders in SmarterMail](#).

### **All Messages View**

To the right of your Default and Custom Folders is the All Messages view. Here, you'll see a list of all of the messages in your inbox or that reside in whichever Default or Custom Folder you're currently in. Your list of messages will always be displayed, but you DO have control over not only where the Preview Pane for a message is placed, but whether you want a preview of your message displayed at all. From your Account Settings, you can choose to have a preview of your message appear to the right of your message list, at the bottom of your messages list, or not at all.

At the top of the All Messages view are Email Interaction buttons:

- New
- Select
- Delete
- Reply
- Sorting
- Actions

Read more about [Reading Email Messages](#) , [Composing Email Messages](#) and [Deleting Email Messages](#) in SmarterMail.

### **Email Interactions**

There are a number of different ways to interact with messages in SmarterMail. Buttons such as New are fairly self-explanatory, but others have multiple different options. Moving from left to right, these buttons are:

- Select - By itself, the Select button allows you to select one or more messages in your messages list. When clicked, you can scroll through your messages and select individual ones as needed, then delete those selected messages, move them, etc.. Alternatively, holding the Ctrl key (on Windows) or the Command key (on Mac OS) also allows you to select individual messages. Using the Shift key allows you to select multiple concurrent messages at a time. Clicking the caret (down arrow) next to the Select button gives you the following options:
  - Select All - Selects all messages in the All Messages view.
  - Deselect All - If any or all messages are selected in the All Messages view, this unselects them.

- 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](#) . Clicking the caret (down arrow) next to the Delete button gives the following options for the message(s) selected:
  - 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. In addition, Undelete is only available for messages Marked as Deleted or messages in the Deleted Items folder.
  - Delete All 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 Email or Deleted Items.
  - Reply - There are three (3) options when replying to a message:
    - Reply - Selecting Reply means you will reply to the the sender only.
    - Reply All - Selecting 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 - Selecting Forward allows you to send the message to someone other than someone in the To and Cc fields. NOTE: It is also possible to add email addresses to the To and Cc fields when you Reply or Reply All to a message.
  - Sort - See the section, below, for more details about sorting.
  - Actions (...) - This button doesn't do anything by itself, but once selected, you have the following actions:
    - Move - Moves the selected message(s) to any available folder. Note: You can also drag-and-drop messages to an available folder.
    - Add Task - Allows you to add a Task that is associated with that message. This is a good way to keep task details aligned with the message that initiated the task in the first place.
    - Print - Brings up the Print dialog on your desktop or device.
    - Mark Read - Marks the selected message(s) as read and changes the status indicator appropriately.
    - Mark 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.
    - Flag - 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.
    - Unflag - Removes the follow-up on the select message 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.

- Mark Spam - Moves the message to the Junk Email folder.
- Mark Not Spam - Marks the selected message(s) as not spam and automatically adds the email address to your trusted senders list. Note: This option is only available for messages in your Junk Email folder.
- 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.
- View HTML - Allows you to view the original message in its rich, HTML-formatted state.
- View Text - Removes any HTML formatting and displays the message as "text only."
- View Raw Content - Allows you to view the message in its raw, unformatted state and includes the header of the message. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.
- View Header - Only displays the message's header information, which includes items such as the message ID, the message's content type, etc.

### Disposable Address

A Disposable Address is a randomly generated address, completely independent of a user's current email address. This address acts as a timed alias, forwarding mail to a parent folder for however long specified. When the time limit has been reached, the address is no longer valid and mail will not reach the mailbox. This is useful when you only need a temporary sign up or don't want to give out your email address and possibly get inundated with spam messages. ||||| .r45995

You can create a Disposable Address from the bottom of the Actions menu. When you create the address, SmarterMail will automatically create the username, but you have the ability to set where the messages to that address are delivered to, plus the length of time you want to use the address. At any time you can either extend that timeframe or disable the address entirely. Simply open the Actions menu and select Disposable Address. NOTE: Only one Disposable Address can be used at any one time. =====

You can create a Disposable Address using the menu option at the bottom of the navigation pane or by right-clicking on the folder itself. When you create the address, SmarterMail will automatically create the username, but you have the ability to select the folder where the messages to that address are delivered, plus the length of time you want to use the address. At any time you can either extend that

timeframe or disable the address entirely. Simply open the Disposable Address option to make modifications. NOTE: Only one Disposable Address can be used at any one time. >>>>>>>> .r46544

### Sorting Messages

To sort messages, click on the Sorting icon and select the field, or fields, you want to use for the sort order for your messages. For example, clicking the Sorting icon and selecting "Size" will sort items in order of their size. (This includes the size of a message plus attachments.) To change the "direction" of the sort, either Ascending or Descending, select that option from the Sorting icon menu as well.

You can get a more granular sorting of messages by selecting their status: All, Unread, Replied To, etc.

In general, the following options are available in the Sorting menu:

- Date - The date and/or time the mail system received the email.
- From - The sender of the email message.
- Subject - The subject of the email message.
- Size - The size of the email in kilobytes.
- Sort Order - Either Descending or Ascending. For example, if you sort messages by Size, Descending order would be from largest message to smallest; Ascending would be smallest to largest.
- All - Will sort All messages.
- Unread - Will sort using all Unread messages as the sort method.
- Read - Will sort using emails that have been read as the sort method.
- Replied To - Will sort using all emails that have been replied to as the sort method.
- Not Replied To - Will sort using all emails that have no replies as the sort method.
- Flagged - Will use emails that are marked for follow up as the sort method.
- Linked to Tasks - Will use emails that are associated with Tasks as the sort method.
- Attachments - Will use emails that have attachments as the sort method.

## Reading Email Messages

SmarterMail displays whether you have unread email in your inbox, or in any folders -- even shared folders -- a number of different ways. Note: The first three notification types are demonstrated in the diagram on the Email Overview page .

- The number displays in the Email icon.
- The number displays next to its folder. (E.g., Inbox)
- A number appears in the browser tab, surrounded by parentheses.
- Unread messages display as bold in the All Messages view.

- A new message notification, also known as a "toast notification," will temporarily display in the webmail interface.

To view the contents of a message, simply click the desired message and it will open in the Preview Pane. You can also double-click the message and it will open in a separate pop-up window. If you do NOT have a Preview Pane showing under or to the side of your messages list, double clicking the message is the only way to open it and read its contents.

### Single Message Actions

In general, the following options are available when viewing a message, either within the webmail interface or when it's been popped out into a separate window:

- Delete - Selecting the Delete button will move 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](#) .
- Reply to a message - There are three (3) options when replying to a message:
- Reply - Selecting Reply means you will reply to the the sender only.
- Reply All - Selecting 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 - Selecting Forward allows you to send the message to someone other that someone in the To and Cc fields. NOTE: It is also possible to add email addresses to the To and Cc fields when you Reply or Reply All to a message.

There are also several Actions that are available for any single message. These generally include:

- Move - Allows you to Move the Message to a Folder. When you select Move, you are prompted to select a Folder where you want the Message to be placed. Alternatively, you can select the message from the All Messages view and drag it to the folder of your choice.
- Add Task - Creates a new Task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- Print - Prints the message.
- Mark Read - Marks the message as Read.
- Mark Unread - Leaves the message in an unread status.
- Flag - Marks the message for follow up.
- Unflag - Removes the follow up from a message.
- Mark Spam - Marks the message as spam and moves it to the Deleted Items folder.
- Mark Not Spam - Marks the message as not spam and automatically adds the email address to your trusted senders list. This Action only appears for messages in the Junk Email folder.

- **Block Sender** - Prevents the sender of the selected message(s) from sending any more messages to the account.
- **Unblock Sender** - Removes the sender's email address from your Blocked Senders list.
- **View HTML** - Allows you to view the original message in its rich, HTML-formatted state.
- **View Text** - Removes any HTML formatting and displays the message as "text only."
- **View Raw Content** - Allows you to view the message in its raw, unformatted state and includes the header of the message. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.
- **View Header** - Only displays the message's header information, which includes items such as the message ID, the message's content type, etc.

## Viewing Remote Content

Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in an email. When remote content is included in an email, that content is hidden by default and must be manually displayed. Clicking on Show will display the remote content for that specific email. Once this has been done, the remote content will be displayed on that email going forward. Clicking on Always show images from [email] will add an exception for that email address to the Remote Content Exceptions list, which is found in your Account Settings. When an exception has been made for an email address, emails from that sender will display all remote content automatically. Note: Emails from Trusted Domains and Trusted Senders will always display remote content automatically.

To allow remote content to be automatically displayed from all senders and sources, enable the Allow Remote Content setting in your Account Settings.

## Downloading Email Attachments

If a message has any attachments, a paperclip will display in the Messages List for that message. In addition, an attachments tab will display under the message header in the preview pane. SmarterMail displays the file name of the attachment as well as its file size. It also displays, where possible, a preview of the attachment as an icon. Generally, this will only happen when an attachment is an image file. Other file types will display a more generic icon. Attachments are downloaded individually by simply clicking on the attachment. However, it is also possible to download all attachments in one convenient ZIP file.

## 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 the New button at the top of the All Messages view. This will pop-out the new message compose window. Having a pop-out allows you to reference other areas of SmarterMail or easily navigate to other browser tabs if you're using other websites for information to include in your new message.

The following fields will appear in the header of the message you're creating:

- **Send From** - If you have more than one SMTP Account set up, or if one or more Domain Aliases is set up, you have the ability to select the email address from which the message will be sent. Otherwise, this field will not be displayed as the message is sent from the one account you have set up.
- **Signature** - If you have more than one Signature set up, or if the Domain Administrator has set up a default signature for you, you have the ability to select the signature used for the message. Note: If the domain administrator has disabled the ability to override domain-level signatures, you will not be able to choose an alternative signature.
- **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. 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** - Carbon Copy (Cc) recipients are those who should be included as part of the conversation, but are not necessarily primary recipients.
- **Bcc** - Blind Carbon Copy (Bcc) recipients are hidden from those people 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.

Below the Subject line is a complete HTML editor that you can use to write and format your message. A number of formatting options are available, from selecting a font color to inserting multimedia elements to a message.

### Email Actions

The following actions are available for a new message:

- **Send** - Sends your message to the designated recipients.
- **Cancel** - Cancels your message. However, SmarterMail has an auto-save setting, so it's possible that a draft of your message will be saved automatically. If this happens, you'll see a

number appear next to your Drafts folder. Clicking Cancel will display a window asking whether you want to save a draft of the message.

- Save 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. Note: By default, SmarterMail has an auto-save frequency of 2 minutes.
- Attach - Allows you to attach one or more files to the message. See below for more information.
- Actions dropdown:
  - Message Priority - Set to High, Normal or Low. Specifies the importance of the message. By default, messages have a normal level of priority.
  - Request Read Receipt - Sends an email confirmation back to the sender when the recipient opens the message.
  - Flag - Marks the message for follow-up. For more information, see [Marking Email for Follow-ups](#).
  - Link File - Uses SmarterMail's File Storage feature to insert a link to a file saved on the mail server or to a file located in a connected file storage account, such as Google Drive, Dropbox or OneDrive. Either way, the links can be sent to recipients who can then download the linked file(s). Note: Linking to a private file in File Storage will enable public access on that file with no set expiration date.

### Attaching Files

In addition to using the Attach button when composing a message, you have the ability to drag-and-drop files to be attached to your 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. Note: To remove an attached file prior to sending the message, just click the X in the top, right corner of the file.

To display an image within your message body, use the Insert Image button from the toolbar editor.

## Replying to Email Messages

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, or to an address that is not in the To or Cc fields.

Messages can be forwarded individually or in bulk. When forwarding multiple messages, the EML file of the email will be attached to a new compose window. 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.

In addition, SmarterMail has an auto-forward option, which can be found in a user's Account Settings, that will forward a copy of all messages sent to a user's Inbox (as well as messages routed to other email folders via content filters or plus addressing).

## Searching Email Messages

SmarterMail indexes all of the messages you receive, regardless of how you organize them in your folders. As long as the message hasn't been deleted and purged from your account, the search tool will find emails quickly and easily. SmarterMail also offers an Advanced Search feature that allows you to search across all of your folders in addition to adding search criteria such as To and From addresses, search strings and more.

To perform a search, first go to the folder you want to search in. This can be your Inbox, Sent Items, Drafts or any of the custom folders you create for organizing your messages. You can also search in shared folders. Next, type the search criteria in the search bar located near the top of the All Messages view. 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. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

It's also possible to use the Sort options for searching for messages that have attachments, that were replied to, that are flagged, that are linked to tasks or more. While not technically a "search", being able to sort your messages using specific criteria can assist with finding the messages you need.

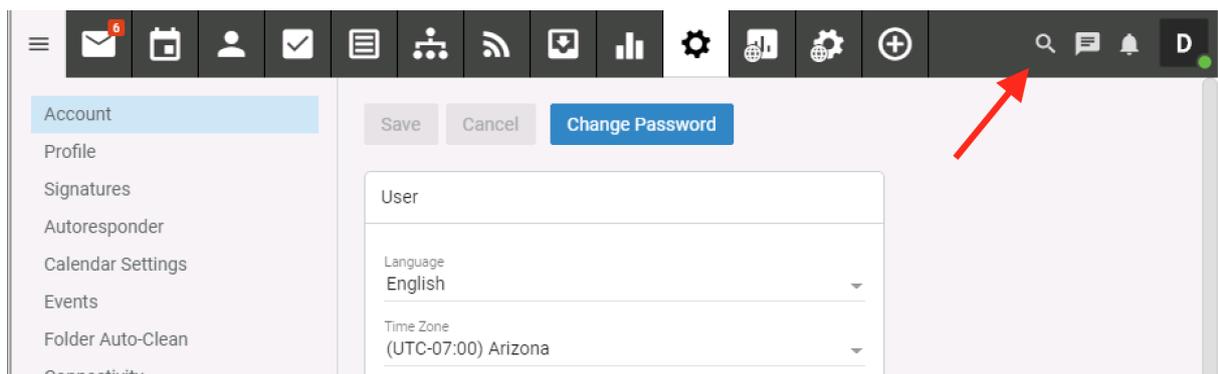
## Advanced Search Overview

SmarterMail users can take advantage of the mail server's powerful search feature to search ALL folders within their mailbox, including Deleted Items, Drafts and other default folders. In addition, Advanced Search is performed outside of the mail interface, so users can continue using SmarterMail while the search progresses as well as view results once it completes. Search results are displayed with complete details (date/time, folder, etc.) making it easy to find the information you are looking for.

Advanced Search differs from a standard search as it not only searches all folders but allows users to add criteria to their search parameters so that specific items are returned. This criteria includes search words or phrases, To and From addresses, timeframes and more.

## Performing Advanced Searches

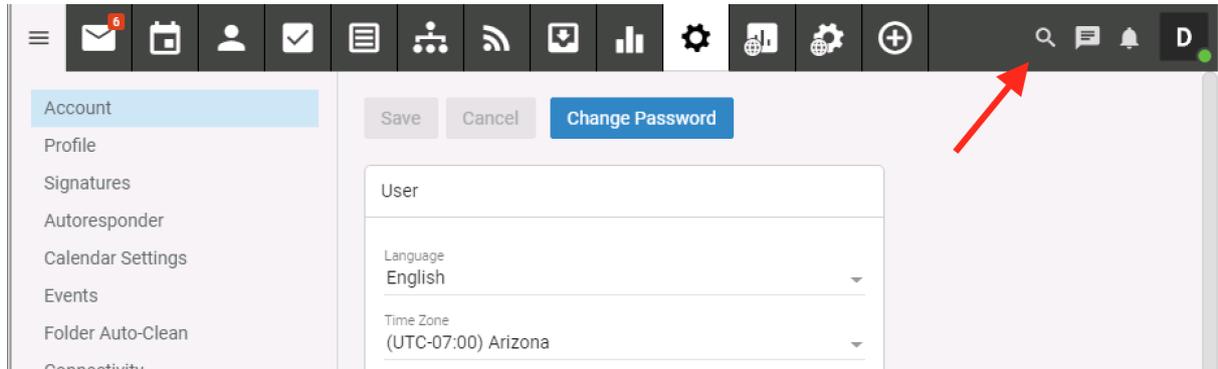
To start an Advanced Search, click on the magnifying glass icon in the upper right corner of the interface.



Once Advanced Search is selected, a new modal window appears. Here, using the Add Criteria dropdown, you pick the criteria you want to use for your search. This includes:

- **Search String:** The words or phrases you want to search for. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."
- **From:** The address a message was sent FROM.
- **To:** The address a message was sent TO.
- **Cc:** The address a message was Carbon Copied TO.
- **Subject:** The complete or partial Subject of the message that was sent.
- **Folder:** The specific Folder to search. If left blank, all folders are searched.
- **After Date:** The Year and Month after which the message was sent. For example, if May 2012 is entered, only results AFTER May 31, 2012 will be returned.

- **Before Date:** The Year and Month before which the message was sent. For example, if January 2015 is entered, only results BEFORE January 1, 2015 will be returned.



Once all choices have been made, use the Search button to initiate the search. The search results display in a separate pop-out window, with results listed in order. It's then possible to click on individual messages and open them in their own pop-out windows. (Messages must be opened individually -- it's not possible to check the box next to multiple messages and have them all open at once.) You can also select a message and use the Open button. Finally, it's possible to delete one or more messages by checking the box next to the message and using the Delete button. Messages deleted from Advanced Search will use whatever default deletion behavior you have chosen for your account. (I.e., moved to the Deleted Items folder, marked as deleted or marked as deleted and hidden.)

## Deleting Email Messages

SmarterMail offers a few different methods for deleting messages:

- You can delete them using the Delete button in the webmail interface,
- You can right-click on the message(s) and select "Delete" from the context menu that appears,
- You can use the Delete key on your keyboard. (Not the Backspace key, but the Delete -- or Del -- key.)

The action SmarterMail takes when you delete a message depends on the option you choose for the Delete Action on the Webmail card 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 on a desktop or mobile client or accessing your inbox using 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. Once the folder is 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: Once the folder is purged, all items marked for deletion and hidden will be removed. Also, 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, simply click the arrow next to the Delete button in the webmail interface and select Undelete from the dropdown. You can also right click on one of the selected messages and choose "Undelete" from the contextual menu that appears. 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.

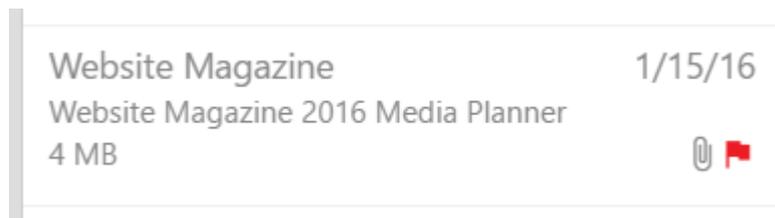
## Effects of Folder Auto-clean

Your system administrator may have established auto-clean policies that may delete older junk email, 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 .

## Flag 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 few 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 All Messages view. Secondly, users can select the desired message and click the Actions menu, then click Flag . You can also right-click on a message and select "Flag" from the context menu. Regardless of which method you choose, 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 Sorting menu in the All Messages view and select Flagged . Your messages will sort, placing the messages with Flags at the top of the list.

The screenshot shows the SmarterMail interface. At the top, there are action buttons: "New", "Select", "Delete", "Reply", and a menu icon. Below these is a search bar. The main area displays a list of emails with columns for sender, date, subject, and size. A context menu is open over the first email, showing options: "Date", "From", "Subject", "Size", "Descending" (checked), "Ascending", "All" (checked), "Unread", "Read", "Replied To", "Not Replied To", "Flagged" (highlighted), "Linked to Tasks", and "Attachments".

Sender	Date	Subject	Size
O Data Centers	2/9/17	How Can IO's Colocation Services Benefit You?	24 KB
Twitter	2/9/17	Follow Rihanna, LeBron James and Kevin Hart on ...	42 KB
Digital Summit Phoenix	2/9/17	Marketers: 20 things you'll learn at Digital Summit	49 KB
Digital Summit Phoenix	2/9/17	20 new things you'll learn at Digital Summit this y...	51 KB
Colin Cieloha	2/9/17	Found You On Linkedin Derek	7 KB
Newegg.com	2/9/17	12-Hr Site-Wide Coupon + Today's Sweet Laptop...	51 KB
SmarterTools (No Reply)	2/9/17		

## Removing a Follow-up Flag

To unmark a message for follow-up, select the desired message and click the Actions menu in the Single Message view. Then click Unflag . The flag icon will turn white and the message will no longer appear in the follow-up view. You can also click on the flag icon or right-click the message and select "Unflag" from the context menu.

## Linking Email to Tasks

Email exchanges can often result in the need to create one or 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.

There are a couple of ways to add tasks to a message:

- First, you can open and view the desired message. From the Message view, click the Actions menu and then select Add Task .
- Another way is to select the message in the All Messages view, then right click on the message and select "Add Task" from the context menu.

Regardless of which method you choose, a new task window will open where you create the actual task. Once the new task has been saved, a tasks card will display at the bottom of the message.

Clicking on this card will allow you to see the task that is linked to the message. You can also go to the Tasks Section of SmarterMail to view all tasks.

## Finding Messages with Linked Tasks

To quickly view all messages that are linked to tasks, expand the Sorting menu in the All Messages view and select Linked to Tasks . Your messages will sort, placing the messages that are linked to tasks at the top of the list.

## 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. These folders will reside at the top of the folders list as well as being listed with any other folders a user creates. These include:

- **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 Email** - Messages SmarterMail believes to be junk mail bypass your inbox and go to the Junk Email folder. You should periodically check this folder to ensure that valid messages were not accidentally delivered to the Junk Email folder. When valid email is delivered to the Junk Email 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 that have large numbers of 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 on the Menu icon at the bottom of the folders view. (It may help to review the diagram on the Overview page .) From that dropdown menu, select Create Folder . This will open a new folder window. In the Parent Folder field, select the appropriate directory to save the folder to, or select "Root Folder" to create the new parent folder. Then, type the name of the new folder. Folder names can include letters, numbers, and the hyphen (-), space ( ), and underline ( ) characters only.

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 move them using the Actions menu or right click on one, or more, messages and select "Move" from the context 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.

Right-clicking and then using the Context menu works the same way: Select one or more messages, right click on one of them, select "Move" and then choose the destination folder.

## 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 the Menu icon at the bottom of your list of folders and select Rename Folder from the pop out menu. In the New Folder Name field, type the new folder name you want to use. 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 the Menu icon at the bottom of your list of folders and select Delete Folder . Then click OK to delete the folder and all of its contents.

## Message Archive Search

Setting up Archiving for All Domains only, and not including per-domain rules, limits the ability to search the Archive to system administrators only. Message Archiving is only available in SmarterMail Enterprise.
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Message archiving is a method of storing all email and live chat 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 Message Archiving rule specifically for example.com needs to be set by the system admin.

System administrators can perform a message archive search by going to the Settings area and clicking on the Manage icon, then selecting Message Archive Search . System administrators can search for a message by domain, date range, the sender's address, the recipient's address, or the subject.

When message archiving is set up for a specific domain, that domain's administrator can find a Message Archive Search option by clicking on the Settings icon . Domain 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](#) .

## [Calendar](#)

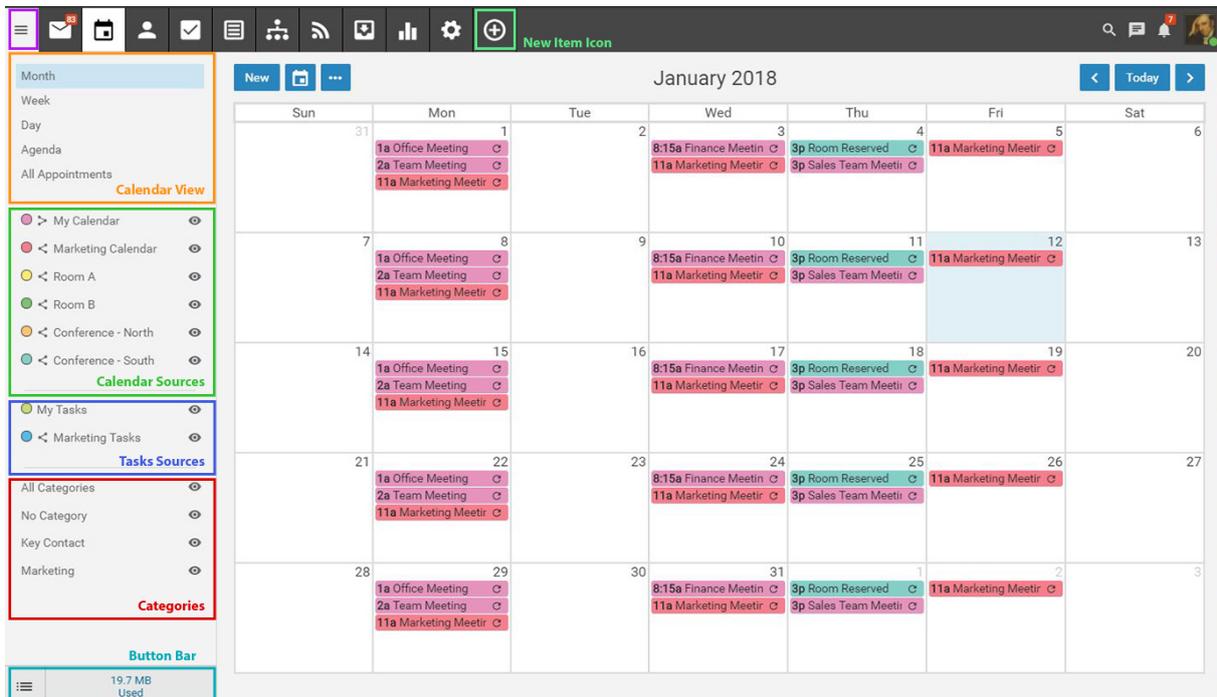
### Calendar Overview

SmarterMail's calendar feature takes the burden out of organizing your schedule and is accessible simply by using a standard web browser on any desktop, laptop or mobile device. SmarterMail's calendar system is extremely flexible and includes many options that make it easy to keep track of important events, including:

- The 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.
- Attendee availability information (Enterprise Edition only).
- Integration with Outlook (Enterprise Edition only).

To access your calendar, click the Calendar icon . By default, when you first access your calendar, the Agenda view will be displayed. However, when you close your browser, SmarterMail will store which view you were last using, then open that view the next time you open your calendar. If you delete browser cookies, the calendar view will reset to the Agenda view. To view multiple calendars or tasks at once or to toggle between views, simply click the eye icon next to the resource you want to show/hide. The options available are based on a user's personal calendars and task list PLUS any shared calendars, task lists or conference rooms that have been shared with you and subsequently mapped to your calendar.

To help you understand the different areas of the Calendar section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas. (click for larger image)



## Navigating Your Calendar

When you view your SmarterMail calendar, you will generally see the Agenda view, which presents 2 weeks' worth of events in list form. (I.e., 7 days prior to the current day, and 7 days moving forward.) You can change your view at any time, and SmarterMail will remember which view you last used, so it's there when you log back in. However, if you clear your cookies, SmarterMail will always default to the Agenda view. Essentially, there are five (5) different Views that toggle between the different ways that SmarterMail displays your events:

- **Month** - 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.
- **Week** - 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.
- **Day** - 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.
- **Agenda** - The Agenda view mimics the Month view, but instead of displaying all appointments and events as a calendar, a rolling 14 days is presented in list form, with the current day in the middle of that 14 days. Shared calendars and resources can be shown or

hidden.

- **Appointments** - The Appointments View displays all events in your calendar, each on its own line. Every event and appointment is listed only once: recurring tasks are denoted with the word "Recurring". The Appointment View makes it easier to find appointments and events as virtually everything in your calendar is listed in one area and easily searchable. NOTE: Tasks, availability-only shared calendars and conference rooms are not displayed in the Appointments view.

There are a few ways to distinguish between the various types of appointments and events:

- Each calendar source has its own color, so you can easily distinguish which calendar the event belongs to.
- All-day appointments only appear at the very top of your calendar, and they have their own, reserved color.
- Recurring events are denoted with a curved arrow in the right corner of the appointment listing.

In general, the following options are available when viewing calendars:

- **New** - Creates a new appointment.
- **Choose Date** - Allows you to select a specific day, then go to that day.
- **Actions** -
  - **Add to Outlook** - Click this button and select Add to Outlook to import all calendar appointments to Microsoft Outlook for Windows. Note: The ability to add your calendar to Outlook is only available in SmarterMail Enterprise and SmarterMail Free editions. In addition, Add to Outlook is not available for Outlook for Mac.
  - **Get CalDAV URLs** - CalDAV is a popular, and free, way to sync your calendar to a desktop or mobile email client or calendar app. Selecting this will give you the specific URLs you need to sync all of your calendars or just your primary calendar. (My Calendar)
  - **Import ICS File** - An ICS file is a calendar file that's saved in a universal format that can be used in several email and calendar programs, including Microsoft Outlook, Google Calendar and Apple Calendar. When moving from one of these applications, SmarterMail can import your existing ICS so you'll have any and all events and appointments set up in your previous calendar app.
  - **Day/Week/Month Navigation** - At the top, right of the calendar view are Previous and Next arrows that allow you to move your view forward and backward. That means, to the previous/next day, week or month, depending on which view you're using. There is also a "Today" button that returns you to the the current day, or to the week or month where the current day is located.

## 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 do this by simply selecting the calendar item. Doing so opens the item in a pop out window, giving you all of the information about the appointment. This includes information like the list of attendees, a description of the event (if one was written), the event's location and much more.

## Shared Calendars

SmarterMail gives users the ability to share their own calendar, or calendars, with others who share the same domain name. In addition, users can "map" calendars that others share so that appointments made on those calendars also appear in the calendar interface.

Shared calendars appear under the Calendar View area. By default, each user has a personal calendar called "My Calendar." This is where you create your daily, weekly, recurring, etc. appointments. You have the ability to share this calendar with others, or you can create additional calendars and share those as well. You can also "map" a calendar someone shares with you so that appointments created in that calendar also appear in your calendar view. Any calendars shared with you will also appear in this list. For more information on how to share your calendar, or map to a shared calendar, take a look at the Shared Resources page in this help documentation.

## Shared Tasks

Just as with Calendars, SmarterMail gives users the ability to share their tasks with others on the same domain. In addition, users can "map" tasks that others share. The difference is that tasks do not necessarily need to appear in your calendar. The ability to display task start and end dates, as well as completed tasks, is set in the Calendar Settings area.

If tasks are set to display in your calendar, then My Tasks, the default task list created for you, and any shared and mapped tasks, appear under the Shared Calendars area. For more information on how to share your tasks, or map to shared tasks, take a look at the Shared Resources page in this help documentation. Please Note: Even though tasks may be displayed 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.

## Creating New Calendar Appointments

It's very easy to create a new calendar appointment in SmarterMail:

- Tap the New button, or
- Tap on the day/time you want to create the event in your calendar. Alternatively, you can tap anywhere in your calendar, then change the day/time as needed.

Regardless of how you decide to do it, creating a new event opens the new event view -- or pops-out the new event window, depending on how you have things set up in your Account Settings .

## 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 handled by a few different cards:

To help you understand the different areas of the New Appointment section of SmarterMail, we created a simple interface diagram.

### Event

The event card carries the actual details of the appointment, reminder or event you're creating. 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, such as "Lunch with Joan" or "Weekly Marketing Meeting".
- Location - This is 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" 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. That said, while the Location is something you enter on your own, the Room will be a shared resource, such as a conference room, that was set up by your domain administrator.
- 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.
- All Day Appointment - This slider allows you to specify an event as an "All Day" event. When

toggled, the start times for the event are disabled.

- 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.
- Description - This space is used for details about the meeting: Agenda items, web conferencing log-in details, etc. Anything typed in the Description will also be added to the appointment so attendees can see the detail as well.

### **Attendees and Availability**

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 attendees accept or reject the invitations. To add attendees, simply start typing their email address. SmarterMail will suggest contacts from your various contact lists, including the Global Address List (GAL), as well as cycle through contacts you have listed in categories. You can finish typing the address or select the proper address from the options available.

As for whether an invitee is available or not, once you've added in one or more attendees, you can click the "View availability for all attendees" link. This will let you know whether the attendee is available on the day and time you're planning your event. In addition, if a conference room was reserved for an event, when clicking on that room reservation in your calendar you can see who reserved the room. Generally, this will correspond to the organizer of the corresponding event. NOTE: Availability is only offered for users of the same domain as the event organizer. External domains, as well as information for users of free email services such as GMail or Outlook365, is not accessible.

### **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.

### **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.

## **Editing Calendar Details**

SmarterMail's powerful calendaring feature gives users the ability to use a single calendar for their own events and appointments, PLUS the ability to share their calendars with others or even map the calendars of others so that those events and appointments can be seen in one, singular interface.

Having access to all of those calendars, and all of those appointments and events, can be somewhat tedious, unless you have a way of keeping them separated in your calendar view. That's where the ability to edit a calendar source comes in handy.

Each calendar you have access to is editable. That means you can modify the color scheme for appointments in that calendar, modify the name of the calendar and more. To edit a calendar source, simply click on the calendar name. When you do, the following modal will open:

As you can see, there are a few options available for editing the calendar source:

- **Display Name** - This is how you want the calendar to display in the Calendar Source view. A calendar that you've mapped will generally have a default name, like "My Calendar on JSmith" or something similar. However, you can modify the name to whatever you like.
- **Color** - This is the background color used for appointments and events created on that calendar. It's a good idea to have different colors set for each, individual calendar you have so that you can easily distinguish between the events and the calendars those events belong to. You can either enter the color code you want to use (e.g., #FBE83) or click on the color selector and choose a color.
- **Default calendar for new appointments** - By default, the calendar that's created for your user -- generally called "My Calendar" -- is the default selection for any new appointments and events that you create. However, if you have a calendar that's shared among a few different people, you may want THAT calendar to be the default. Regardless, toggle this option to choose the calendar you want to use as your default for new appointments.

As you can see in the screen capture, there are a few options that appear in the editing modal that are displayed, but not editable. These include your Username , which is the username for your particular email account, and the Access that's been granted to you for that calendar. For more information on the different types of access available, head over to the Sharing and Collaboration section of Help.

## 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 from any calendar view and it 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 . The appointment will no longer appear on your calendar and any attendees will receive a notification that the appointment has been cancelled. Note: For recurring events, you have the option of deleting all instances from your calendar or just a single 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 cancelled 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 cancelled or re-scheduled for a later day and time. To

delete an instance, open up the event and clicking the Delete Instance button. 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, click on the appointment to load its details in a popup window. 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 dashed line around the appointment window at the day/time the event is scheduled.

## Integration with Outlook TM (Outlook is a trademark of Microsoft and all references in this help recognize this trademark.)

This feature is available in Enterprise Edition only
--

Calendars and contact lists can be loaded into Outlook and displayed side-by-side with your existing Outlook calendar and contacts. This allows you to see your current appointments and contacts from SmarterMail right in Outlook.

In order to use the Add to Outlook connection, you should have Outlook installed and be using it.

- In SmarterMail, navigate to the calendar or contact list you wish to connect.
- Click on the Add to Outlook icon from the actions toolbar.
- A popup window will appear with additional instructions. You'll be prompted to select the version of Outlook you're using, which calendar or contact list you wish to sync, and then you have the option of changing the default Description and/or add in a Display Name for the item you're syncing.
- 
- Click OK to initiate the connector.
- A security popup will appear from Outlook, explaining that an external source wants to attach to Outlook. Click on Yes to allow the connector to attach.
- The resource is now available in Outlook.

Note: If you change the password on your email account, the connections will be broken and will have to be reestablished.

## Sharing

Sharing a resource, such as a calendar, contacts, notes, tasks, or email folders, will allow the users you specify to access the resource with a pre-determined permission level. More Info on sharing resources

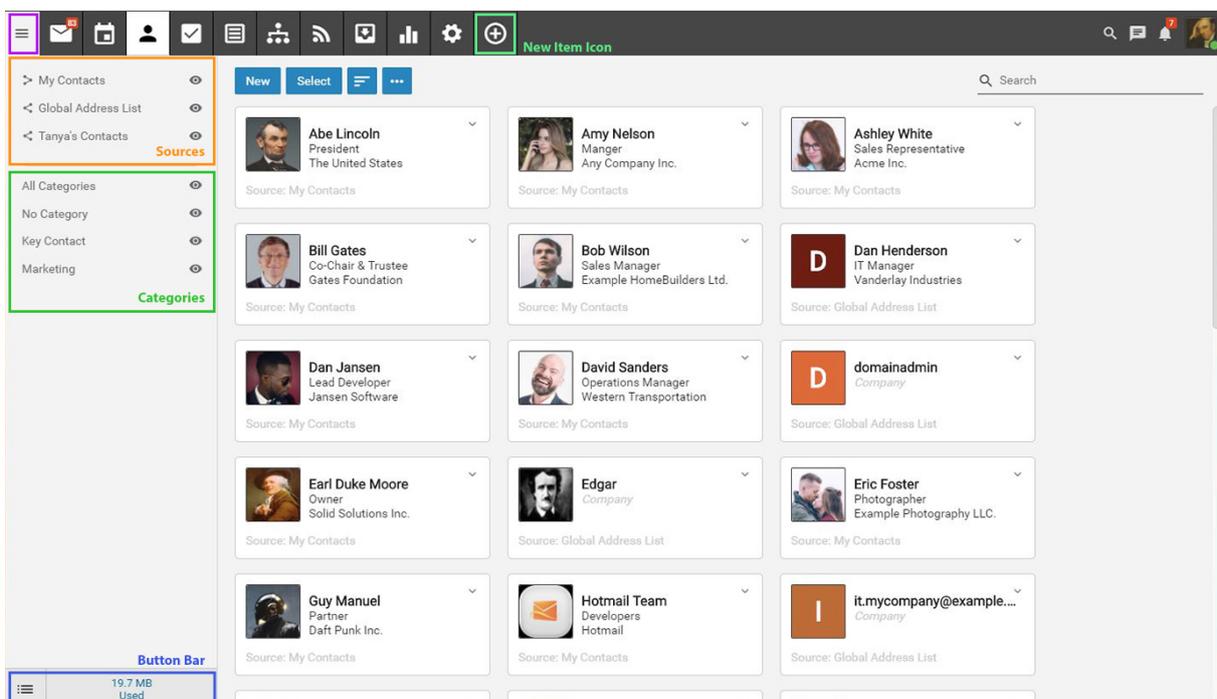
## Contacts

### 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 or hide different contact lists, such as the Global Address List, shared lists, or mapped resources, simply click the eye icon to the right of the resource name.

To help you understand the different areas of the Contacts section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



## Navigating Your Contacts

When you view your SmarterMail contacts for the first time, chances are they'll be empty: you won't have any contacts to display. This may not be true if you've migrated to SmarterMail from another email platform or service. Regardless, the layout of SmarterMail contacts is the same whether you have migrated contacts or not.

### **Burger Icon**

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

## Contact Views

In general, the Contacts page is divided into two sections:

- The Contacts view displays all of your contact lists. This includes "My Contacts", which are contacts you add or migrate over to SmarterMail, and any shared contact lists, such as a Global Address List (GAL).
- Individual cards that represent every contact you have displayed.

### **All Contacts View**

In general, the following options are available when viewing all contacts:

- New - Creates a new contact.
- Select - Allows you to select more than 1 contact at a time. To select multiple contacts, click Select and then click on one or more cards. To exit Select mode, click the Select button again. To de-select a contact, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:
  - Select All - Selects all contacts in the list you are viewing.
  - Deselect All - Deselects the selected contact(s).
  - Delete - Deletes the selected contact(s).
  - Sort - Sorts contacts by display name, email, or company in ascending or descending order.
  - Actions:
    - Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes contact information. Note: This feature is only available in SmarterMail Enterprise.
    - 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 all to vCard - Exports all of your contacts in vCard format.
    - Export all to CSV - Exports all of your contacts in CSV format.

## **Individual Contacts**

In addition to working with all of your contacts, each individual contact has some actions that are available. To view these, simply click the down arrow, or caret, on each card. When you do, these actions are available:

- Send Email - Addresses an email message to the selected contact(s).
- Send vCard - Allows you to send an email with the the selected contact(s) electronic business card(s) (vCard) attached.
- Export to vCard - Exports only the selected contact(s) in vCard format.
- Export to CSV - Exports only the selected contact(s) in CSV format.

## **Contacts as Trusted Senders**

By default, SmarterMail "sees" any contacts you add as "Trusted Senders." What that means is that any email you send to, or receive from, a contact bypasses any spam filters that are set up for your domain. While SmarterMail doesn't add your contacts to the "Trusted Senders" list you will find in your Spam Settings , they're handled the same way. However, unlike the email addresses or domains you add to your Trusted Senders list, messages sent to or received from contacts are not counted in any reports that list or detail messages to or from Trusted Senders. Therefore, while a contact is treated like a Trusted Sender, it's not counted as one in reports.

## **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 manually typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, simply view the desired message. 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 Contact and Block Sender. Click the Add 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, open up your Contacts and click the New button. This will open a new contact window that you will use to add the contact to 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 separated using various cards. These include:

- **Personal Info** - These are the "personal" details of your contact, including their display name, title (Mr., Mrs., etc.), first name, middle name, last name, their personal website (or "home page"), and birthday. You can also add a photo, avatar or icon for your contact by simply clicking on the grey circle next to the contact's Display Name. This picture is available within the webmail interface and for anyone using CardDAV or the Microsoft Exchange ActiveSync add-on to sync their contacts with email clients and/or mobile devices. Unfortunately, pictures will not sync for customers using Add to Outlook for synchronization. Note: The Display Name is the only required field to save a contact.
- **Phone Numbers** - You can add one or more phone numbers associated with your contact, like their home phone, mobile number, etc.
- **Email Addresses** - Just as with phone numbers, you can add one or more email addresses for your contact. If a contact has more than one email address, you can select which address to send to when typing the contact's name in the TO: field for a new message.
- **Home Address** - The contact's home address.
- **Work Address** - The contact's place of work, including their work Title (CEO, Marketing Director, etc.), should they have one, their company's website address, etc.
- **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.

## 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 your contact list. It's best if you have all views available, such as My Contacts, Global Address List, etc. so that each view is searched. 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 "%."

## 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/Exporting Contacts

To initiate the importing or exporting of contacts, click the Actions button at the top of your list of contacts. From the dropdown, you'll see the following:

- Add to Outlook - This is used for connecting your contact list to an installation of Microsoft Outlook. For more information, see Outlook Integration .
- Import - Allows you to import your contacts from an external email client, a separate email service like Gmail, or from another SmarterMail account.
- Export All VCARD - Exports all of your contacts in the standard vCard format for importing into an email client, separate service or to another SmarterMail account.
- Export All CSV - Exports all of your contacts in a "comma separated values" format for importing into an email client, separate service or to another SmarterMail account. CSV files can also be opened using virtually any spreadsheet program such as Microsoft Excel.

### 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](#) . Regardless of the file type imported, each contact MUST have a Display Name in order for SmarterMail to accept the importing of the contact. Other information can be added at a later date.

### Exporting Contacts from SmarterMail

Contacts can be exported individually in vCard or CSV format. These files can then be imported into Microsoft Outlook or other email clients that accept these file types, 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](#) .

## 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 any aliases and/or mailing lists.

Contact information for the Global Address List is pulled from the individual account profiles of users. To update your listing, go to your settings area . Under User Settings, go to your Account Profile and edit your information.

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.

Other than the availability of the information within the Global Address List, it functions almost identically as My Contacts. The difference is that anything in My Contacts is seen only by you.

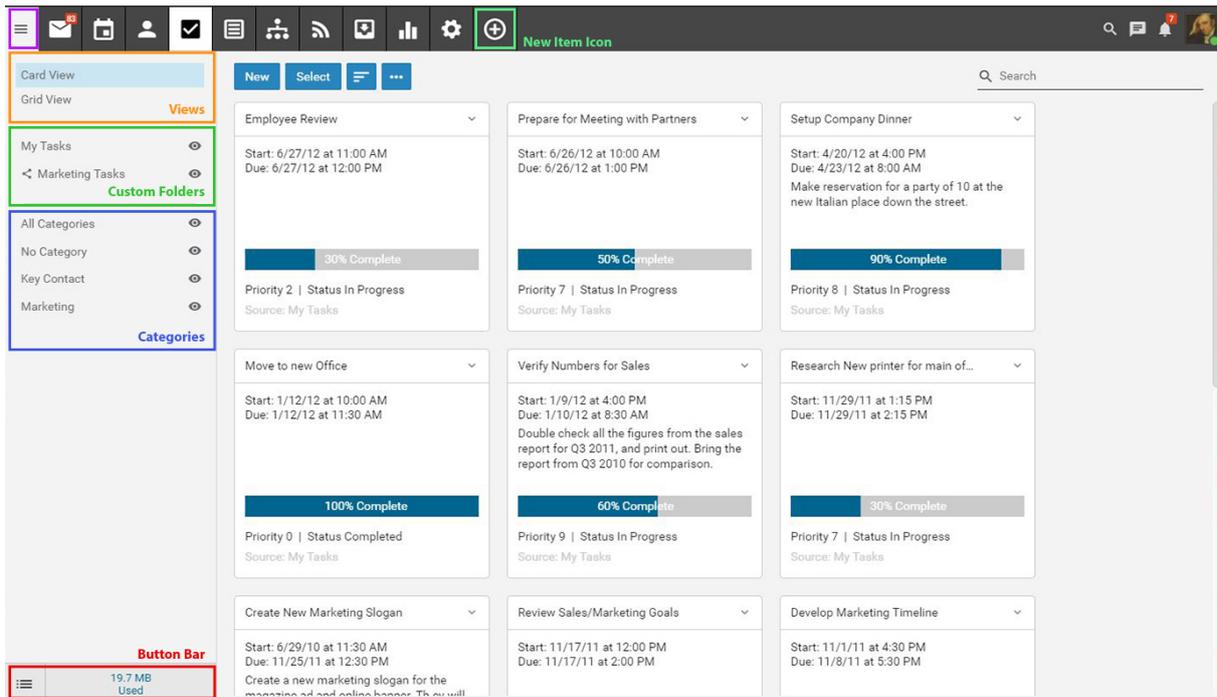
## Tasks

### Tasks Overview

SmarterMail's robust task system is designed to help users keep track of the things 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 the starting point for, or linked to, tasks so that all communication surrounding the task is kept organized.

To access your tasks, click the Tasks icon . By default, the My Tasks source is displayed. (Though there may not be any tasks listed, just yet.) If other task sources are being shared with you, they will appear beneath My Tasks once they've been mapped. (see Mapped Resources for more information on sharing resources.) Making multiple task sources visible will display all of the tasks, from each source, together in the All Tasks view.

To help you understand the different areas of the Tasks section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



## Navigating Your Tasks

### Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

### Task Views

In general, the Tasks page is divided into two sections:

- The Tasks view displays all of your task sources and any Categories that have been created. This includes "My Tasks", which are tasks you add to SmarterMail, and any sources that other users have shared with you.
- Individual cards that represent every task you have displayed.

### All Tasks View

When you view your tasks, each task you have created or that's being shared with you will be listed on a separate card. Each card lists the following information, which is described in detail further down this page:

- Task Subject - This is the descriptive title of the task, such as "Fill out mortgage paperwork" or "Review New Website Content"
- Description - These are the details of the task. Using the HTML editor, a task's details can include bold text, lists, different fonts or fonts with different colors, pictures, links to websites or videos and more. You can be as creative as you like

- Source - This tells you where the task came from> E.g., My Tasks or a shared task list.
- Start - The date and time the task is set to begin.
- Due - The date and time the task should be completed.
- Reminder - If you want a reminder notification to be sent when a task is about to End, select it from this dropdown.
- Priority - This allows you to set a level of importance for each task. A priority makes it much easier to sort tasks based on how important it is to complete those tasks.
- Status - Generally, these are:
  - Canceled - The task was created, but it was eventually decided it wasn't necessary.
  - Not Started - The task was created -- perhaps more information is needed or it's dependent on a task from another user -- so it hasn't been started yet.
  - Completed - The task is finished.
  - In Progress - The task is currently being worked on.
  - % Complete - This allows you to periodically update where you are in terms of completing the task. This is especially helpful if the task is being shared with others within your organization. As an aside, once a task hits 100%, it's "Status" will automatically change to "Completed". Conversely, if a task was set to 100% and, therefore, Completed, if the Completion Percentage changes to less than 100%, the Status of the task automatically changes to "In Progress".

In general, the following options are available from the All Tasks view:

- New - Creates a new task.
- Select - Allows you to select more than 1 task at a time. To select multiple tasks, click Select and then click on one or more cards. To exit Select mode, click the Select button again. To de-select a task, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:
  - Select All - Selects all tasks in the list you are viewing.
  - Deselect All - Deselects the selected task(s).
  - Delete - Deletes the selected tasks. NOTE: You can also use the Delete key on your keyboard.
  - Sorting menu - Clicking the Sorting menu brings up the following options:
    - Subject - The name/title of the task.
    - Due Date - The date the task is due to be completed.
    - % Complete - How far along the task is in terms of meeting its deadline.
    - Priority - The importance of the task.
    - Ascending - Sort order placing the items that are most active/recent/important first.
    - Descending - Sort order placing the items that are least active/recent/important first.
    - Not Started - Status noting that the task has yet to be started.

- In Progress - Status noting that the task is currently being worked on.
- Completed - Status noting that the task is finished.
- Canceled - Status noting that the task was canceled and will not be worked on.
- Actions (...) menu - Connects SmarterMail to Microsoft Outlook and synchronizes task information. Note: This feature is only available in SmarterMail Enterprise.

## Tasks and Calendars

As tasks generally have a timeframe associated with them, you can choose to have your tasks displayed in your calendar, just as you do other events. You can opt to have the start time and/or the end times displayed. To manage this, go to your User Settings and open up Calendar Settings . On the Options card, you can toggle "Display task start times in the calendar view" and/or "Display task due times in the calendar view" to turn these on or off. As with any other calendar event, task start times and end times both trigger any notification you have set for the task.

## Creating a Task

Starting a new task is extremely easy: simply click the New button in the All Messages view. Once you do this, you'll be able to start entering your task details. These include:

**Subject** - This is the simple name for the task, like "Create new blog post" or "Organize meeting notes".

**Task Description** - This is where you enter more details about the task. For example, a copy of any meeting notes or general notes necessary for the completion of the task. These can be updated at any time. Editing the description and keeping additional notes there is especially beneficial when participating in shared tasks. In addition, the task description area is fully HTML compliant with a rich editor so it's possible to stylize the description with different fonts and colors, links to outside resources, etc.

Then there are the Task Details , which include:

- **Source** - Where the task is kept. By default, new tasks are stored within My Tasks, but if you have shared tasks with others, you can save a task there as well so the person you're sharing with can keep track of the task's status.
- **Start** - The date and time the task is supposed to start. Both areas have quick-select icons for setting the date as well as the time, but you can manually enter this information as well.
- **Due** - The date and time the task is due. Again, both areas have quick-select icons for setting the date as well as the time, but you can manually enter this information as well.
- **Reminder** - If you want to be reminded prior to the Start Date/Time
- **Priority** - Priorities help you keep abreast of important tasks and helping you organize your

time. Important tasks, obviously, would take a higher priority whereas daily or monthly tasks may carry less weight. 0 priority would have less importance whereas 10 tasks would have the highest priority.

- Status - The status of a task reminds you, and others if sharing tasks, where the task is in terms of its progress towards the due date.
- % Complete - Adding a % Complete further lets you, and others if sharing tasks, how far along the task is in terms of meeting the due date.

Finally, there are Categories . Just like within Contacts and other areas of SmarterTools, it's possible to add one or more categories to tasks. Adding categories is a great way to keep tasks organized.

## Editing a Task

To edit a task, simply click on the card of the task you want to modify. Once opened, you'll be able to edit any area of the task. Editing tasks is important, especially when tasks are shared with others, to add new notes, adjust due dates and % complete and more.

## Tasks and Calendars

Depending on whether you have your calendar set up to display the start and/or end times for tasks, once the task is saved, it will appear on your calendar. Note: 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 All Tasks view. 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 "%."

## Notes

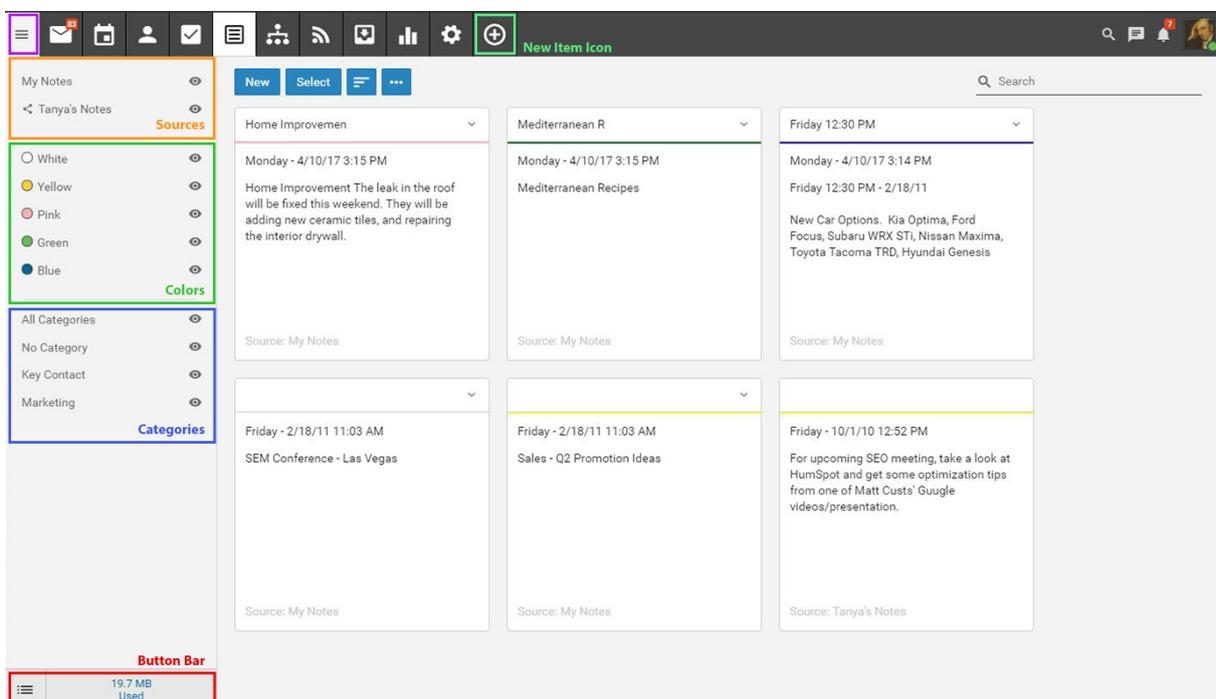
### Notes Overview

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 . By default, the My Notes source is displayed. (Though there may not be any notes listed just yet.) If other notes sources are being shared with you, they will appear beneath My Notes once they've been mapped. (see Mapped Resources for more information on sharing resources.) Making multiple notes sources visible will display all of the notes, from each source, together in the notes view. You can then view or hide notes sources to either limit or expand the number of notes you're viewing.

To help you understand the different areas of the Notes section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



## Navigating Your Notes

### Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

### Notes Views

In general, the Notes page is divided into two sections:

- The Notes view displays all of your Notes sources and any Categories that have been created. This includes "My Notes", which are notes you add to SmarterMail, and any shared notes

source.

- Individual cards that represent every note you have displayed.

## All Notes View

When you view your notes, each note you have created or that's being shared with you will be listed on a separate card. Each card lists the following information:

- Subject - The note's descriptive title. E.g., "Shopping List" or "Motivational Sayings"
- Description - The contents of the note. Using the HTML editor, a note's contents can include bold text, lists, different fonts or fonts with different colors, include pictures, links to websites or videos and more. You can as creative as you like.
- Source - This tells you where the note came from, or, in cases where notes are shared with others, where you want the note saved. E.g., My Notes or "Marketing Notes".

In general, the following options are available from the All Notes view:

- New - Creates a new note.
- Select - Allows you to select more than 1 note at a time. To select multiple notes, click Select and then click on one or more note cards. To exit Select mode, click the Select button again. To de-select a note, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:
  - Select All - Selects all notes in the list you are viewing.
  - Deselect All - Deselects all the selected note(s).
  - Delete - Deletes the selected notes. NOTE: You can also use the Delete key on your keyboard.
- Sorting menu - Clicking the Sorting menu brings up the following options:
  - Date - The date the note was created.
  - Color - The color category assigned to the note.
  - Subject - The name/title of the note.
  - Ascending - Sort order placing the items that are most active/recent/important first.
  - Descending - Sort order placing the items that are least active/recent/important first.

## Creating New Notes

Starting a new note is extremely easy: simply click the New button in the All Notes view. Once you do this, you'll be able to start entering your note details. These include:

Subject - This is the simple name for the note, like "Shopping List" or "Meeting Notes".

Description - This is where you enter the actual note contents. The note description area is fully HTML compliant with a rich editor so it's possible to stylize your note contents with different fonts and colors, links to outside resources, embedded videos, etc.

## Note Details and Categories

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

- Details - Select the note Source -- either My Notes or, if you're sharing notes with others, you can save your notes there. Note colors are a great way to keep notes of a specific type neatly organized. As a side note, the colors available match the colors of traditional paper sticky 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 to a note, simply move the toggle next to the category you want to apply. To create a new Category, use the Cog at the top of the Notes view.

## Searching Notes

If you have a large number of notes in your notes list, finding a specific one 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 All Notes view. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search both the the Subject and Description of every note for matches and display the results. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

## Chat

### Group Chat Overview

This feature is only available in SmarterMail Enterprise.
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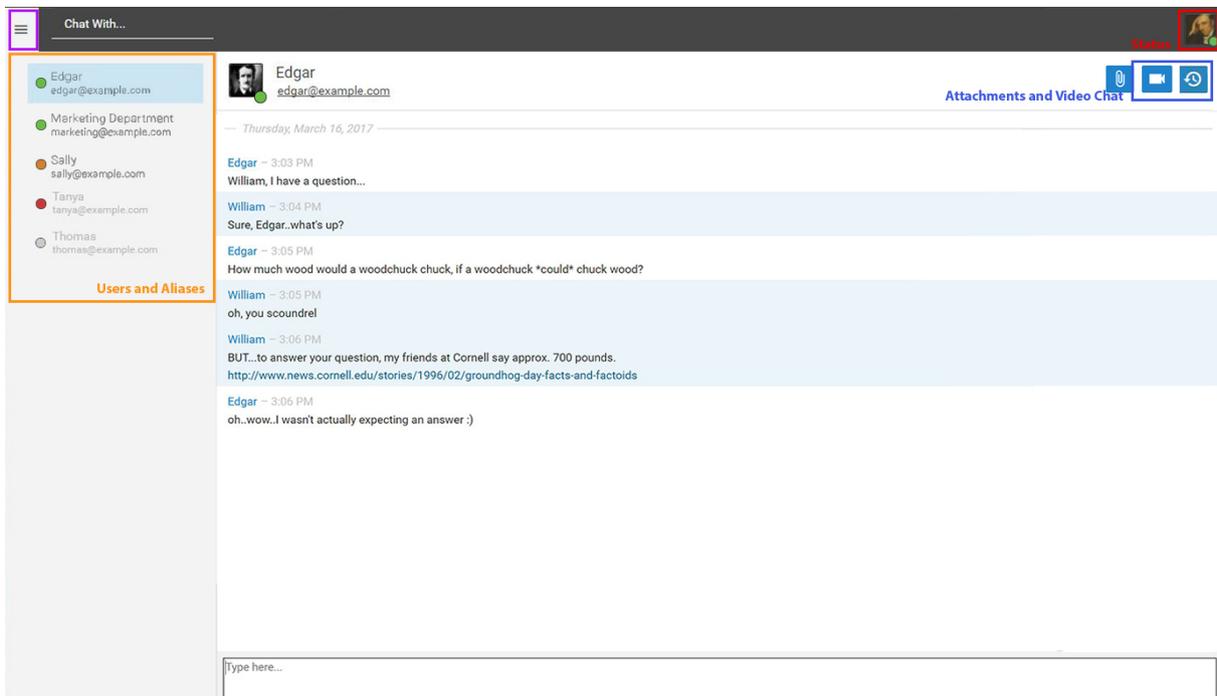
SmarterMail's group chat feature allows users on the same domain to chat with each other, instantly and securely, right within the webmail interface or using a variety of desktop and/or mobile chat clients, such as Pidgin, Adium, IM+ and others. Users can also create video chat rooms, where up to 8 people can interact using real-time voice and video. Video chat links appear in the messaging area when a chat is started with another user, but that link can be shared with anyone. If you don't want to use the web interface, most third-party chat clients that support the XMPP (Jabber) protocol can be

used for text chat. There's no doubt email is a great communications mechanism, but there are times when real-time voice, video and text communication is crucial.

To access the chat feature, click the group chat icon that appears in the top, right corner of the web interface. You can do this at any time or only when you receive a new live chat. When a new chat is received, the group chat icon will display an unread flag. (See image.)



Clicking on the live chat icon will pop out the live chat window. The live chat window is where you can interact with others via live chat. To help you understand the different areas of the Group Chat pop out, we created a simple interface diagram that labels various features and viewing areas. (click for larger image)



## Navigating Group Chat

### Chat Layout

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

- The Group Chat Users/Aliases view - This area displays the contacts on your domain. These are the people you can chat with. If aliases are set up so that multiple people can chat at the same time, those show at the top of the view with individual users showing below aliases. A user's chat status is also displayed. (The status for an Alias is not displayed because aliases contain multiple individuals, so tracking the status of an alias won't work since each individual in the alias can have a different chat status.)

- The actual chat area. This is where your live chat occurs. Previous chats are listed, in order, beginning with the most recent chat session you've had with that user. The 75 most recent lines are displayed OR the chats you've had with that user in the last 30 days are displayed, if the total chat lines don't add up to 75. Scrolling up in the chat area will display older chat threads.

Chat With... - This area allows you to type in the username of an individual. The Chat With area is especially helpful in cases where a domain has a large number of users. Typing in a username allows you to find the person you want to chat with quickly and easily versus having to scroll through a large list of users.

### **Modifying Your Chat Status**

There are 2 ways to modify your chat status:

- Change it on the mail webmail interface by clicking on your user avatar.
- Change it on the live chat pop out by clicking on your user avatar.

As for the chat status definitions:

- 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.
- Do Not Disturb - You are logged into chat, but are busy. Therefore, you're not available to chat at the moment and may not respond for an extended period of time.
- Offline - When this setting is checked, any user that is offline will appear in the users list, but the user name and availability will be greyed out. Deselecting this will hide all offline users from the list.

Clicking on your avatar also displays 3 other options:

- Open the Online Help - This opens the help documentation for SmarterMail. By default, it will open the help document to the page in help that corresponds to the page you're currently on in the web client.
- About SmarterMail - Opens a modal window that displays the version of SmarterMail that's running, the version number, and copyright and licensing info.
- Logout - This will completely log you out of SmarterMail, NOT simply log you out of chat. To stop receiving group chat messages, you need to set your status to Offline.

## **Burger Icon**

At the top of the Chat view you'll see the Burger icon. (Highlighted with a purple box in the diagram, above.) The Burger icon allows you to hide or show the list of Grup Chat users, which is extremely beneficial when you're on smaller devices, such as a tablet or smartphone.

## **Starting a Video Chat**

SmarterMail's group chat includes real-time video chat. To start one, simply click the camera icon. Once you do, you're presented with a link that will be displayed to whomever you're currently chatting with. Clicking the link will open a new window, where your video chat will be actually occur. Up to 8 people can participate in a video chat, so the link can be shared with anyone you want to invite to the video chat -- not simply those within your organization!

During a video chat, users have full control over their own video and audio feeds, you can mute participants, you can share a desktop with others and much more! For more information about SmarterMail's video chat, including information on settings, see [Using Video Chat](#) in the Team Workspaces area.

## **Sharing Files and Links**

To share a file, you can simply drag files into the chat area or use the paper clip icon. Depending on the file type, when a file is shared a thumbnail will display for image files such as .JPG and .PNG file types and/or a link to the file is displayed. When someone clicks on the thumbnail or link, a preview of the file will be displayed in a new browser window so that the recipient can look at the file before they download it. Shared links can just be pasted in the live chat box, but they will also display a thumbnail of the page that's linked to, and links open in a new window regardless.

## **Searching Group Chats**

This feature is only available in SmarterMail Enterprise.
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On occasion, you may need to refer to a previous chat conversation you had with a contact. One of the best things about SmarterMail is that it indexes all communication, so all of your chats are stored and, therefore, retrievable, so your information is never too far away.

### **Start a Chat Search**

There are 2 ways to search group chats:

- Each user has the ability to download their own chat transcripts, or
- Depending on how Message Archiving is set up, a system administrator and/or a domain administrator can use Message Archive search.

## User Chat History

When viewing a group chat you've had, either with another user or with a group (Alias), in the chat window, next to the Video Chat icon, is a file button. Clicking that allows you to download a text file that is the history of all of the chats you've had with that user or group. You can save a Zipped version of that file (it's compressed because that text file can be quite large) to your local machine, then open it in your favorite text editor. Using the search feature of that text editor allows you to find the search phrases you're looking for as well as the entire threads where those search phrases were discussed.

## Message Archive Search

As mentioned in other places in this help document, SmarterMail has the ability to archive any and all communications that travel through it. SmarterMail archives at the Spool level, which means that any message that is sent through, or received by, SmarterMail is archived before any additional actions are taken on it. So, if a message comes into a mailbox but the user deletes it, SmarterMail will still have that message saved in the archive because it's stored BEFORE the message reaches that end user. The same is true for group chat. That said, the ability to do a full archive search on group chats depends on how the system administrator has Message Archiving set up for your particular domain. For archive search availability, you'll want to check with your domain administrator first, then your system administrator.

## **Connecting to Third-Party Group 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 .

## **Team Workspaces**

### **Team Workspaces Overview**

This feature is only available in SmarterMail Enterprise.

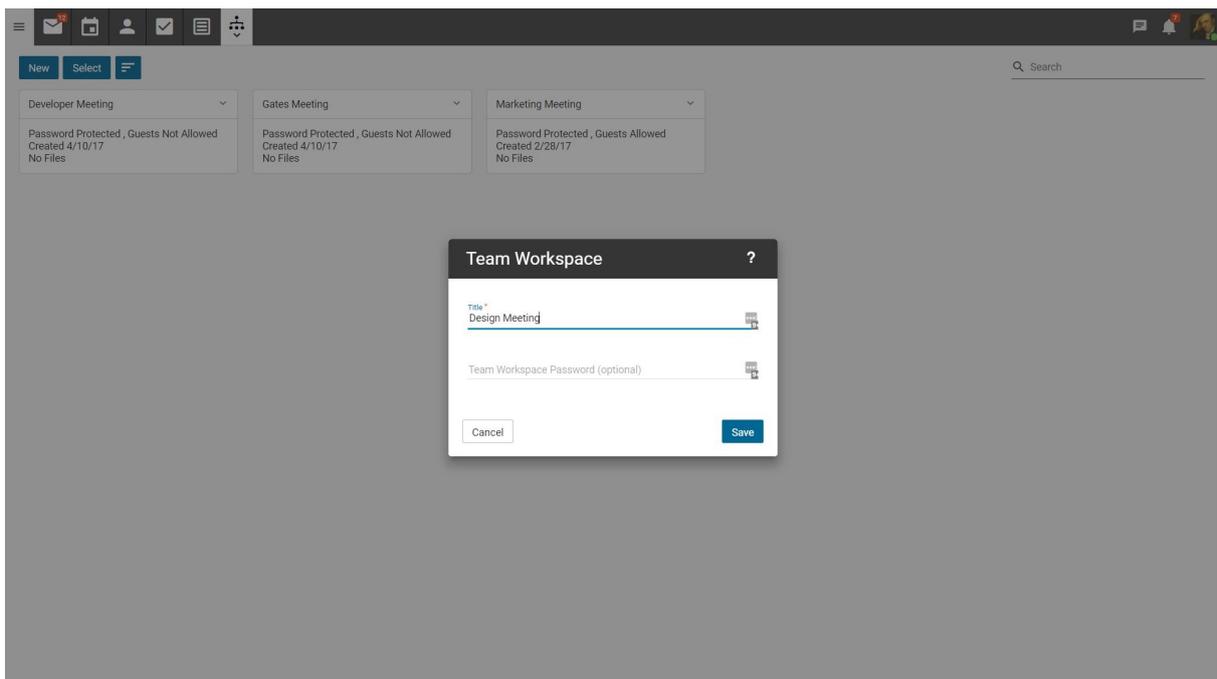
While group chat is a great resource, there are times when simply exchanging text with someone isn't enough. In addition, group chat is limited to coworkers and others who share your same domain.

That's where SmarterMail's Team Workspaces come into play. A Team Workspace includes real-time audio and video chat, inline Group Chat, document sharing and an interactive whiteboard. NOTE: While any number of participants can be invited to a Team Workspace, audio and video chat is limited to up to 4 concurrent users.

A SmarterMail Workspace is a great way to gather people for an online meeting. You can start the workspace right from within the webmail client and then share your workspace link with whomever you want to attend: others in your office, remote workers or even someone outside of your organization. That's right: You can invite anyone to your workspace -- all they need is the workspace URL. There's no software to download, no services to sign up for and workspaces are both desktop and mobile friendly!

## Creating a Team Workspace

Creating a team workspace is extremely simple. All you need to do is click on the Team Workspaces icon . Once the Team Workspace view opens, click the New button, and you'll be presented with this:



Simply title your workspace, and you're ready to get started. However, if you want some privacy, you can add a password to the workspace, BUT only the title is needed to actually create the workspace. Once you click the Save button, you can either stop there or open the new workspace and customize your settings.

## Team Workspace Settings

After you create your workspace, you can open it and modify the workspace settings. As an aside, you

can edit these settings at any time by clicking on the Settings (gear) icon whenever you open your workspace. Below is what the settings page for a team workspace looks like:



Team workspace settings include:

- **Workspace Title** - This will be whatever you called the workspace when it was initially set up, but you can change it at any time.
- **Workspace Description** - Using the HTML rich editor, add details to your meeting with bulleted lists, clickable links to external resources, formatted text, embedded images or movie files and more. This can contain your meeting agenda, a list of questions to go over, or any information you want your participants to see.
- **Workspace Details** - This is where you set up the workspace security and access permissions.

These options include:

- **Secure with a password** - If you want to lock access to your workspace with a password, that's not a problem. Simply set it here and then let whoever you send your invitation link the password you set.
- **Allow guest users** - Don't want to force your attendees to log in? No problem! Just toggle "Allow guest users" and anyone with the link can attend the meeting, no log in required.
- **File upload permissions** - Each meeting workspace has the ability to allow users to upload files. However, the meeting organizer can set file upload permissions so that only the organizer has upload permissions, people who are authenticated users can upload files, or anyone can upload. NOTE: - It IS possible to restrict the file extensions that are able to be uploaded to a team workspace. However, the File Storage Extension Blacklist is set by the system administrator.

Once you have all your settings in place, be sure to save them. You can then open that workspace's page and your meeting is displayed:

The screenshot shows a meeting workspace interface. On the left, there is a sidebar with icons for a meeting, a workspace, a chat, and settings. The main content area is titled "Weekly Product Review" and includes the following information:

- Weekly meeting to discuss:
  - Current Feature Progress
  - Issues and Roadblocks
  - Review of "Where We Are"
  - Upcoming New Features
- Use this link to invite participants:
  - <https://mail.smartertools.com/interface/meeting/#/a2a42e5b12266eaf927a730468c24912.smartertools> Copy
- This team workspace is not protected by a password. Only the organizer can upload files.
- Organizer: **Derek Curtis** (with profile picture)

At the top right, it says "Wednesday, March 15, 2017" and "Welcome to your team workspace, powered by SmarterMail." At the bottom right, there is a text input field labeled "Type here..."

## Access Previous Meetings

Any meeting room you create is saved in your Team Workspace view as a separate card in the My Workspaces area. That means you can access, and re-access, any past meetings. While the video isn't saved, any live chats and shared documents ARE saved in the workspace, allowing you to refer back to those at a later date whenever needed.

The screenshot shows the "My Workspaces" area in SmarterMail. At the top, there is a navigation bar with icons for mail, calendar, contacts, and settings. Below the navigation bar, there are four workspace cards, each with a dropdown menu and a summary of the workspace's settings:

Developer Meeting	Gates Meeting	Marketing Meeting	Weekly Product Review
Password Protected, Guests Not Allowed Created 4/10/17 No Files	Password Protected, Guests Not Allowed Created 4/10/17 No Files	Password Protected, Guests Allowed Created 2/28/17 No Files	Guests Allowed Created 5/1/17 No Files

At the top right of the workspace area, there is a search bar labeled "Search".

## Participated Meetings

Not only are the meetings/workspaces that YOU create listed, so are workspaces that you've been invited to. To access these, simply click on the Participated Meetings option from the left navigation pane. Here, meetings that you've participated in are listed as separate cards. While you won't be able to edit any information on these cards, you do have the ability to revisit the meetings, see chats, re-login to the video chat and more.

## Recurring Meetings

Want to use the same team workspace for multiple meetings? Not a problem: simply add the team workspace link to a recurring event invitation in your calendar and your event invitees will have instant access to your workspace for each recurring event, be it a meeting, a monthly roundtable discussion or just to hang out and catch up.

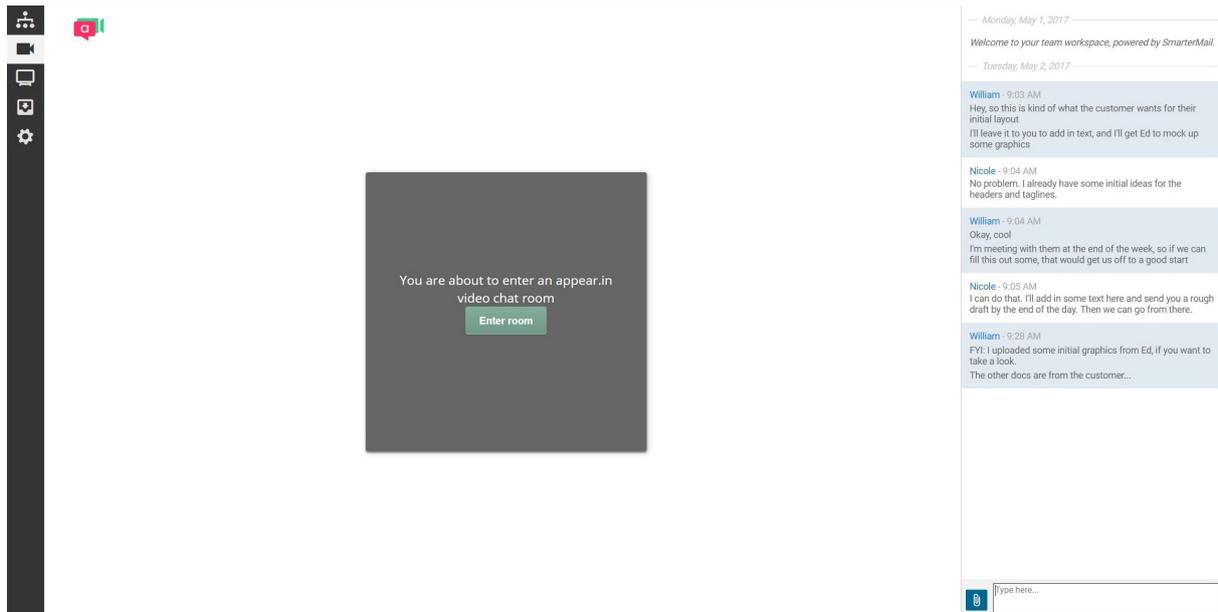
## Team Workspaces Video Chat

This feature is only available in SmarterMail Enterprise.
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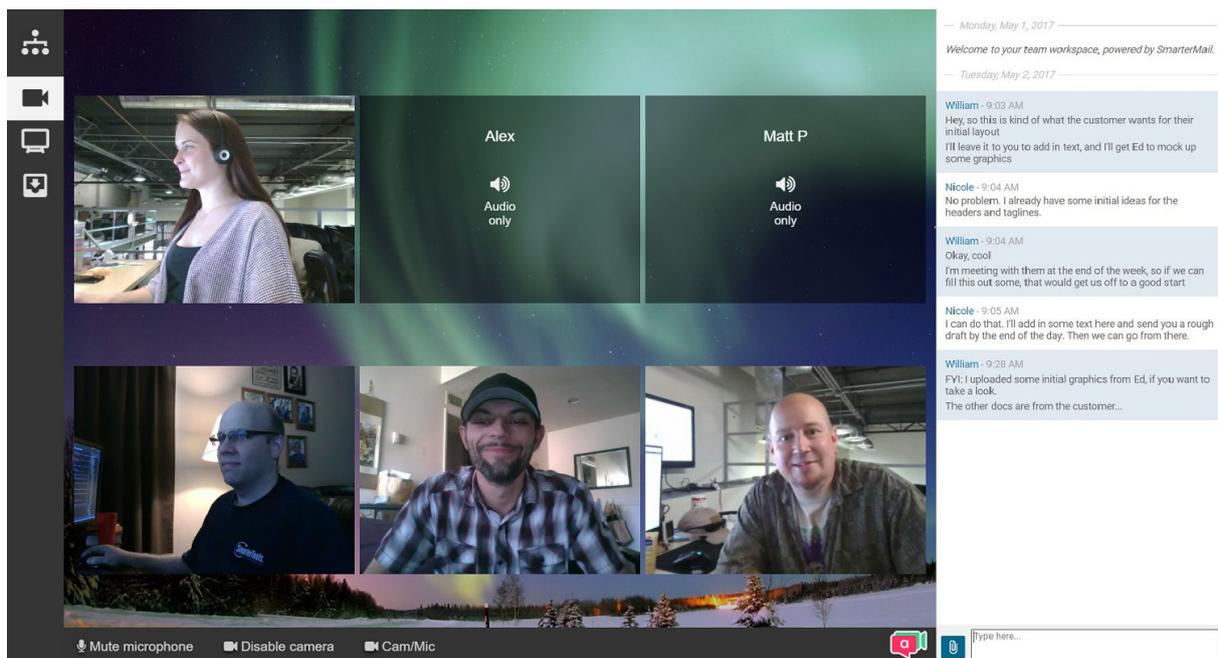
Even with the persistent group chat that's available in Team Workspaces, there are times when text chat just isn't enough. With Team Workspace video chat, you can have real-time audio and/or video chat with up to 4 participants at the same time. In addition, each participant has complete control over their own audio and video -- that is, they can turn either on or off as needed -- as well as audio controls over others. So, if someone is in a noisy environment and they forget to mute their microphone, each participant can mute that person themselves.

## Starting a Video Chat

Starting a video chat is extremely simple. All you need to do is click on the Video icon . It looks like a little video camera. Once the video chat view opens, you're presented with a dialog that tells you you're about to enter a video chat room. Click the Enter Room button, and you're ready to go.



Once you enter the room, you'll see your own audio/video feed as well as the video feed of other participants. If none have joined in just yet, you'll simply see a blank box that says "Waiting for other people..." As others join, their feeds will also display.



## Video Chat Settings

Participants have some control over the audio and video settings that are used. To modify those settings, simply click on the Cam/Mic control at the bottom of the video chat screen. Once they do, the Settings modal pops up:

✕

## Switch preferred camera and microphone



If you are having problems, try restarting your browser.

### Camera

HP TrueVision FHD RGB-IR (06 ▾)

### Video Quality

Good

Low

### Microphone

Default ▾

### Sound Output

Default ▾

Updating preferences will refresh your browser window.  
You will automatically rejoin the conversation.

Save

The Cam/Mic settings include:

- Camera - This allows a participant to select the web cam used for the video portion of the chat. More often than not, this will be the default webcam that's part of the user's laptop or display. However, if an external webcam is being used, it should appear in the dropdown.
- Microphone - Just as with the Camera, this will most likely be the default microphone on the participant's device. Again, however, if an external microphone or headset is being used, that should appear in the dropdown.
- Sound Output - The default speaker set should be used by default, but if an external source is desired, it can be selected from the dropdown.

- Video Quality - There are two choices: Good and Low. In cases where a participant is on a back internet connection, or even a cellular connection, the Low setting may be preferred.

## A Quick Note

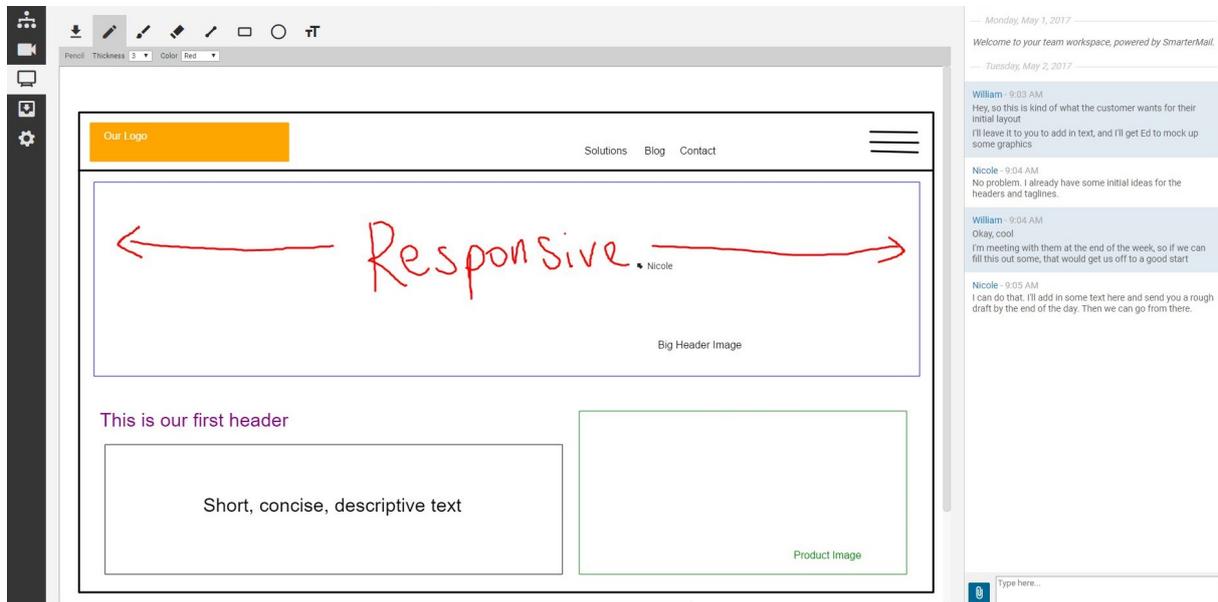
The Team Workspace video chat does require you to allow the use of your microphone and video camera. Depending on your browser settings, this may occur without you needing to take any action. However, if you experience issues with either the audio or video, make sure your browser is not blocking the connection. In addition, if you're using any security software, such as Eset or Malwarebytes, they may need to be checked so that access to the camera and microphone aren't being blocked.

## Team Workspaces Whiteboard

This feature is only available in SmarterMail Enterprise.

The Team Workspace feature of SmarterMail is for true collaboration between participants. The interactive Whiteboard is a perfect tool for collaborating as it offers a number of different tools for use on the whiteboard, and any participant can add, edit or delete items in real time.

### Whiteboard Layout(Click to open in a new window)



The Team Workspaces whiteboard acts just like any other whiteboard you have in an office: multiple people can draw on it at the same time, erase lines and sections, write freehand or use text boxes and much more. The name of each person who is accessing the whiteboard is also displayed as they move around the board and add their own items or make changes. (See the cursor with "Nicole" next to the "e" at the end of the word "Responsive".)

The tools across the top of the whiteboard are varied, and each tool has its own set of customization options. The tools include:

- Download - Once participants are finished with their markup, the whiteboard can be downloaded and saved as a PNG file.
- Pencil - Just like any other Pencil tool, this draws freehand lines around the board. You have the ability to set the thickness of lines and the color, as needed.
- Brush - The Brush tool differs from the Pencil as it draws lines that are a bit more fluid and more like calligraphy. However, you can still modify the thickness and color of the lines as needed.
- Eraser - The Eraser acts as a typical whiteboard eraser: it erases as you go. You can set the thickness of the area erased, PLUS there's the ability to clear the whiteboard entirely.
- Line Tool - The Line tool allows you to create straight or angled lines. As with the other drawing tools, you can set the thickness and color of the lines you create. However, you can also select the line's style: solid, dotted or dashed.
- Rectangle Tool - This allows you to create outlined or solid squares and rectangles of any size. For outlined items, you can set the thickness and color of the outline. For solid items, the thickness indicates the rounding of the item's corners. When you select a higher thickness the item's corners will be more rounded than items with a lower thickness, which would be sharper. The color selection indicates the fill color.
- Circle Tools - Similar to the Rectangle Tool, but for circles and ovals.
- Text Tool - This allows you to add text to your whiteboard. You're able to set the font, the font size and the font color of the text as well as select "Bold" or "Italics" for the text decoration.

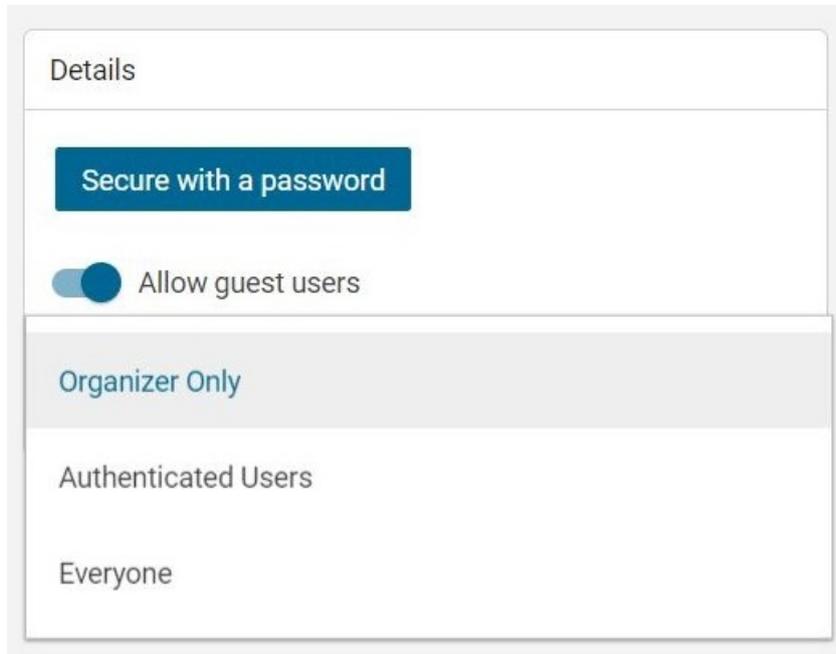
## Team Workspaces File Uploads

This feature is only available in SmarterMail Enterprise.

Part of having a collaborative workspace is the ability to upload and share files. The Team Workspace organizer has the ability to set the file upload permissions for their workspace. They can allow anyone to upload files, only allow authorized users (people who log in) to upload or limit file uploads to just themselves. However, anyone who participates in the Team Workspace can download any files that are shared. NOTE: Management for files uploaded in a Team Workspace belongs solely to the workspace organizer, regardless of who has the ability TO upload files. This is to ensure that all files are preserved as part of the workspace at the organizer's discretion. Therefore, the disk space used for workspace uploads also counts towards the total disk space of the organizer.

## Setting File Upload Permissions

The Workspace organizer has the ability to set permissions for the types of attendees that can upload shared files. This is done in the Settings area:



The options for setting attendee file upload permissions include:

- Organizer Only - The only person who can upload files to a team workspace is the user who set up the team workspace in the first place.
- Authenticated Users - Attendees who log into the team workspace are able to upload files; guests can not upload.
- Everyone - All attendees are able to upload files as needed.

## Uploading and Sharing Files

Once permissions are set, it's time to upload and share some files. A few quick things to note:

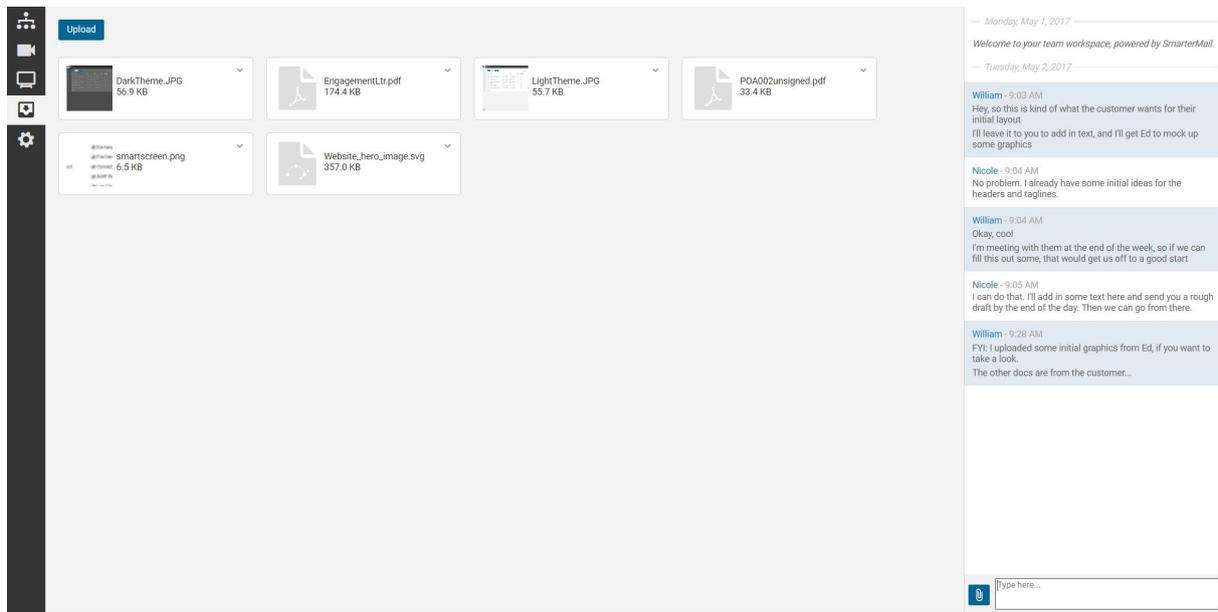
- By default, files shared are sorted alphabetically by file name.
- Just as with the File Storage area, whenever possible a thumbnail of the file will be displayed. If a thumbnail can't be displayed, then an icon representing the file type will be displayed.
- Shared files will show the file name and the file size on their respective cards.
- Clicking on the Caret allows attendees to either download or delete each file.

As for actually uploading files, there are a few ways to do this:

- Drag and Drop - You can drag and drop files in either the upload area OR in the group chat area. In either case, files will be uploaded to the workspace and displayed in the upload area.

Files dropped into the Group Chat area will also display a download link, just as they do in a regular Group Chat .

- Upload/Attach Buttons - You can also use the Upload button in the upload area OR use the Attachment button (the paper clip) in the Group Chat area to upload files. Clicking either of these buttons will open your File Explorer (or similar) and allow you to choose a file to upload. Simply select the file and click the Open button to upload it. (Click to open in a new window)



## Downloading or Deleting Shared Files

Each file that's shared in a team workspace has its own card. Each card, in turn, has a Caret in the upper, right corner. Clicking on that card gives a participant the ability to download that particular file. In addition, a participant can delete the file, should they choose to.

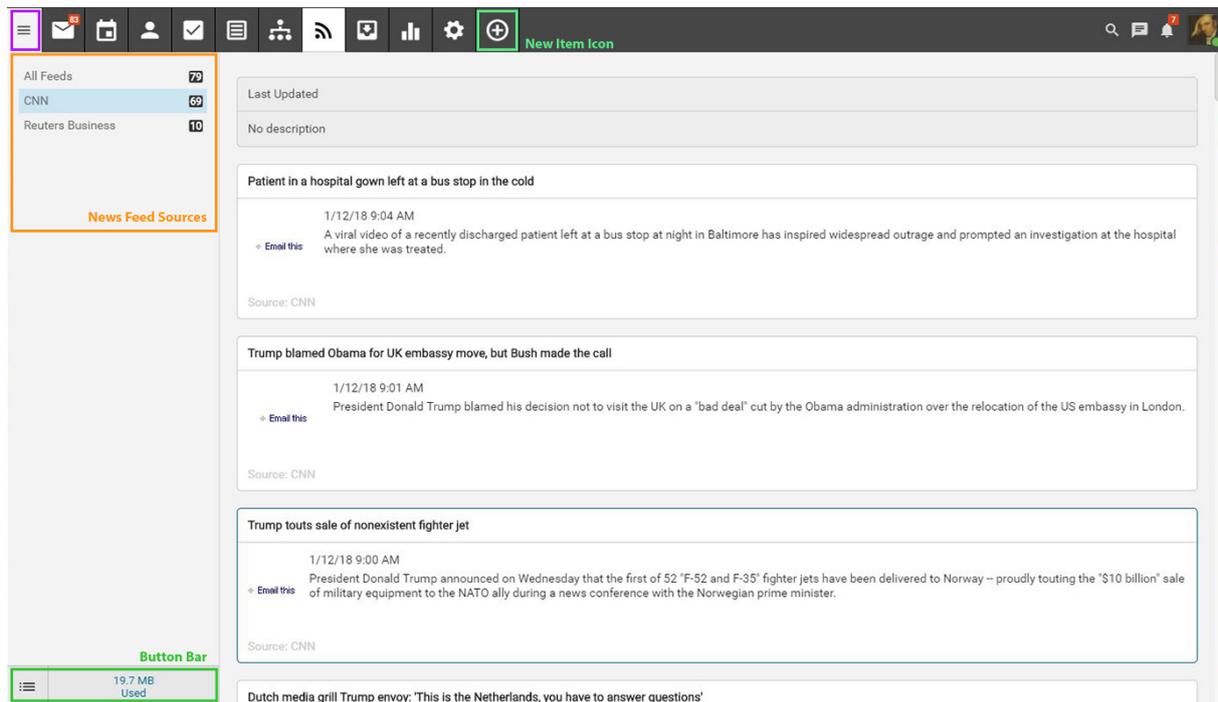
## News Feeds

### News Feeds Overview

Real Simple Syndication (RSS) is a way for website owners to make their content available for people to read at their leisure using a centralized application, or Feed Reader. Websites publish lists of updated content via "feeds" that indicate when a new article, blog post or community thread is available. So, 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 News Feeds section of your SmarterMail account, so you don't have to do a ton of clicking around or have multiple browser tabs open.

Using RSS 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 help you

understand the different areas of the News Feeds section of SmarterMail, we created a simple interface diagram that labels some areas to be aware of.(click for larger image)



## Navigating Your RSS Feeds

### RSS Feed Layout

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

- The RSS Feeds View displays all of the RSS feeds you have added to SmarterMail. Any recent or unread updates to a specific RSS feed are shown with a number to the end of the feed's name. To view the feeds, simply click the desired feed's name.
- The content view displays a list of the articles, with a brief synopsis, in the the RSS feed you are viewing. Simply click on the article to open it up in a new browser tab at the original source.

### Adding a New News Feed

Adding a new feed is simple. However, you'll need to grab the proper feed URL from the site you want to add. Generally, a website will have a RSS feed listed somewhere on their website.

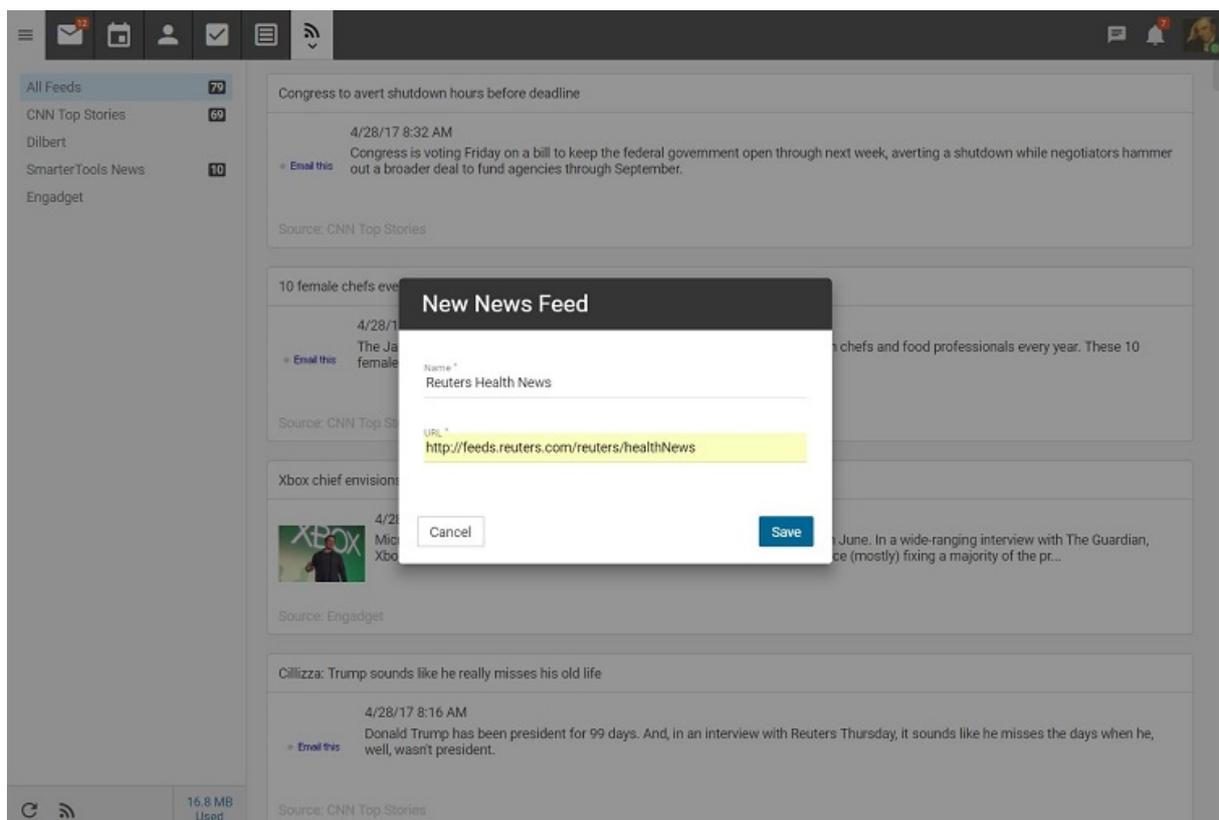
Additionally, you can do a search for "Website A's RSS feed" in your favorite search engine and that site's feed URL should be one of the results. If you're unsure where to start, you can do a search for "best RSS feeds for news" or "best RSS feeds for tech reviews" and the results will be many.

Generally, a RSS feed URL looks something like "https://www.wired.com/category/gear/feed" or even "http://feeds.reuters.com/reuters/healthNews". On most sites, they're designated with this RSS feed icon:



If you were to click on a RSS link in your browser, you'll see the raw feed page, which is probably a XML page. Therefore, it will look like a bunch of oddly grouped blocks of text surrounded by XML tags. Fear not: the News Feed reader in SmarterMail can make perfect sense of what you're seeing.

Once you have a feed URL, it's time to add the feed to your News Reader. To do this, click in the RSS icon in the Button Bar at the bottom of the news feed area. Once you do this, a modal will open. Add the feed's name, then the feed URL, and save your change. Once you do, that feed name will show up in your feeds view and, once all of the new feeds are grabbed by SmarterMail, a number will appear next to the feed's name, telling you how many new items were retrieved. Continuing doing this for any new feed you want to add.



You can also edit an existing feed -- for example, you want to rename it or change the feed URL -- and delete feeds using the RSS button. Next to the RSS button in the Button Bar is the "Refresh" button. Use this to manually have SmarterMail retrieve your feeds for any new items.

## File Storage

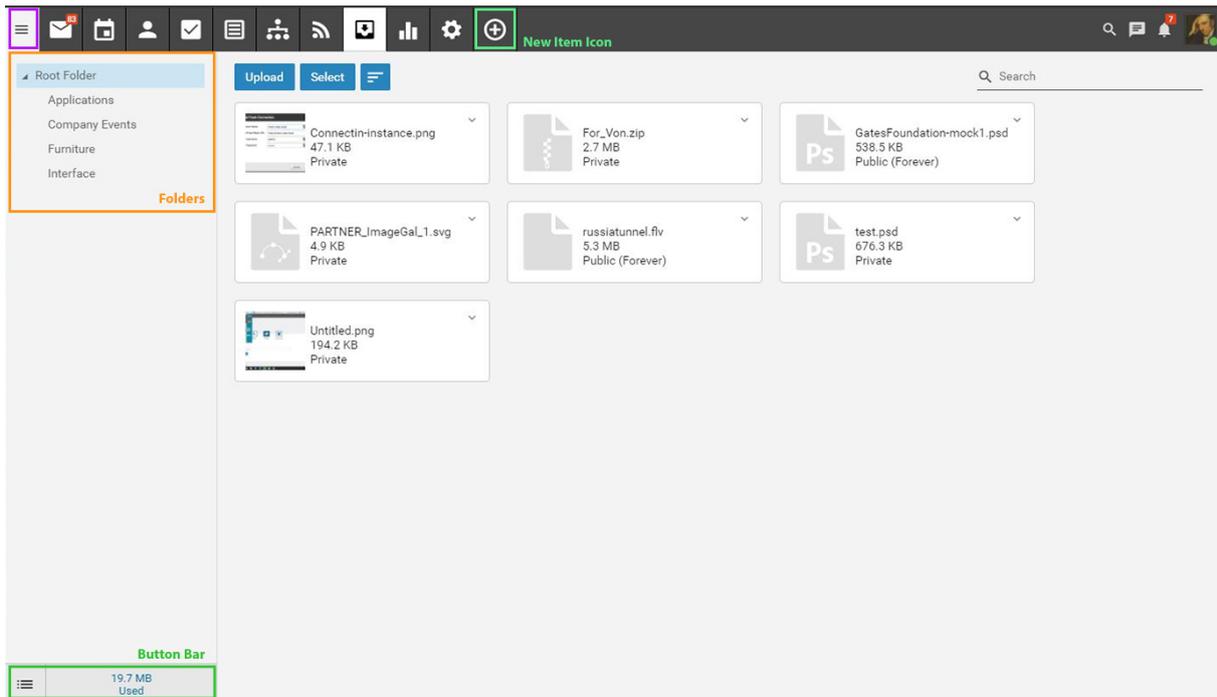
### File Storage Overview

SmarterMail's file storage feature bypasses some limitations of sending standard email attachments plus it can help keep a mail server secure and running reliably.

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 is that it allows users to send larger files without worrying about hitting any attachment size restrictions enforced by a domain administrator, system administrator or hosting company. Sending links instead of actual files also helps recipient mail servers as it keeps potentially insecure files from hitting the mail server, not to mention it bypasses any file type restrictions a recipient's mail server may have set up. For example, if an email administrator blocks Powerpoint files, sending the link to that presentation versus the presentation itself ensures the recipient receives the file. 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.

With file storage, users can upload files to the mail server and then share them by sending out links to those files. Recipients can then download the files to their local desktop or mobile device. Files can be public or private, links can be secured with a pre-shared password, they can last forever or have expiration dates, and much more.

To help you understand the different areas of the File Storage section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger size)



## Navigating File Storage

### Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

### File Storage Layout

When you view file storage, each file you've uploaded will be listed on a separate card. Each card lists the following information, which is described in detail further down this page:

- File Type Icon - An icon that represents the type of file uploaded. (E.g., page with a zipper for a .ZIP file.) For image files, SmarterMail attempts to generate a thumbnail of the file rather than use a generic icon, though not all image file types are supported.
- Filename - The actual file name plus its extension.
- Status - Whether the file is available to the public or if it's private. If it's a public file, the expiration date and time for the link is displayed, if one has been set.

In general, the following options are available from the All Files view:

- Upload - Clicking this button allows you to upload a file to File Storage.
- Select button - Allows you to select more than 1 file at a time. To select multiple files, click Select and then click on one or more cards. To exit Select mode, click the Select button again. To de-select a file, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:

- Select All - Selects all files in the list you are viewing.
- Deselect All - Deselects all the selected files.
- Delete - Deletes the selected files. NOTE: You can also use the Delete key on your keyboard.
- Sorting menu - Clicking the Sorting menu brings up the following options:
  - Filename - The date the note was created.
  - Size - The color category assigned to the note.
  - Date Uploaded - The name/title of the note.
  - Public - Files available to the public are listed first.
  - Ascending - Sort order placing the items that are most active/recent/important first.
  - Descending - Sort order placing the items that are least active/recent/important first.

### **Uploading Files**

Uploading a file to SmarterMail's file storage works just like any other upload: After clicking the Upload button, your file system opens and you can navigate to where the file you want to upload is located. Simply select the file and click "Open" and the file begins its upload. The time it takes to upload the file depends on a number of things, such as the file's size and the type of internet connection you have. By default, files uploaded are set to "Private", so they can't be shared. For more information on sharing files, see [Sharing Files](#) .

### **Deleting and Downloading Files**

Once a file has been uploaded, you may want to remove it or re-download it to your local machine. Clicking on the file name of the uploaded file you're presented with:

- Delete - Allows you to delete the individual file.
- Download - Allows you to save the file locally.

### **File Storage Folders**

Adding folders for storing file uploads is the perfect way to keep those files organized. It's easy to create folder: just click Create Folder. Just like when creating a folder for your emails, you can name the folder whatever you want and then place the folder either right in the root or inside a folder you've already created.

### **File Storage Extension Blacklist**

By default, SmarterMail allows system administrators to keep a list of file extensions that are excluded from file storage. These files generally can cause issues for people who download them, much less the SmarterMail server itself. These file types can include, but are not limited to: Windows executable files; Java files; Batch files and more.

## Sharing Uploaded Files

As mentioned, the primary purposes of File Storage in SmarterMail are to both bypass any potential attachment limits imposed by domain administrators and alleviate any potential stress or performance impact on the mail server. SmarterMail keeps files uploaded in a different location than email attachments, but, just like with email attachments, files uploaded count against any total disk space allocations for your entire mailbox. That said, SmarterMail does show users how much disk space they're using, and even separates file storage disk space from overall email space.

Sharing files is easy, but it does require a couple of simple steps. These include:

- Enabling public access to the file, and
- Sharing the link to the file in an email or live chat.

### Enabling Public Access

The screenshot shows a 'Stored File' settings window. At the top, it says 'Stored File' with a question mark icon. Below that, the 'Filename' is 'Connection-instance.png'. There is a toggle switch for 'Enable Public Access' which is currently turned on. Underneath, the 'Expiration Date' is '3/15/17 3:50 PM' with a 'Change' button. A 'Password' field is shown with a masked password. The 'Public Download Link' is a long URL: `https://mail.smartertools.com/download?data=bkEjBjG3b4VWF%2bsDpkllFBx3RouXSS0j%2fPt4%2b4B52ovxwwe7ktFvGQ6qllMjpd%2fRPtxdiCefo6rKpQl%2b3jjK9mNlr1VQFu5WBKTvRUHsC3U%3d`. At the bottom, there are three buttons: 'Cancel', 'Delete', and 'Save'.

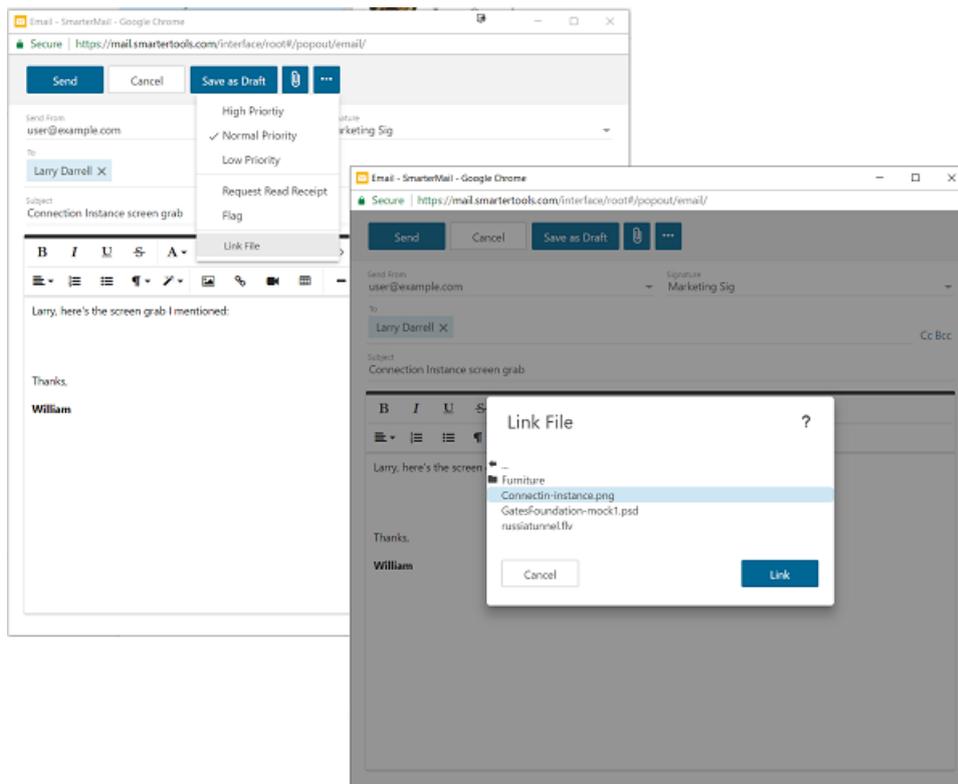
Once the file is uploaded to the file storage area, it will display in the All Files view. To set the sharing options for the file, you simply need to edit the file's settings by selecting its card from the list. Once you've clicked on the file's card, the following options will be available:

- **Filename** - The name of the file. This defaults to the file name of the uploaded file plus its extension. However, you can change this to whatever you like.
- **Enable Public Access** - Toggling this option allows you to make the file available for sharing via a public link. Keeping the toggle off makes the file private, and, therefore, unable to be shared.
- **Expiration Date / Time** - The date and time that the public link to download the file expires.

Leave this set to "None" and the link will never expire. Several default timeframes are available, from 1 hour up to 1 year. You can change the timeframe as needed. If you want to remove the expiration date/time, simply move the slider back to the off position.

- Password - The password used to download the file. Leave this blank if you don't want to password protect the link.
- Public Download Link - This is the direct link to the file. This can be shared to anyone by copying the link and inserting it into an email message or live chat.

## Sharing a Link



Once you've added public access to a file, the next thing you need to do is share it with someone.

To share a file directly from the webmail interface, simply type up your message, and when you want to insert the link, select the Actions button and when the menu drops down, select Link File . A modal window opens and you'll be able to select a file from anywhere within File Storage. Click the Link button, the file's name is inserted into your message, and that file name also acts as the clickable link for the user. They simply click the file name and they can download and save the file anywhere.

If you're using a separate email client, or even live chat, you can use the Public Download Link. Just add that entire link to any message created in an email client, when using live chat, when exchanging text messages or any other communication method and whomever you're talking to can download your file.

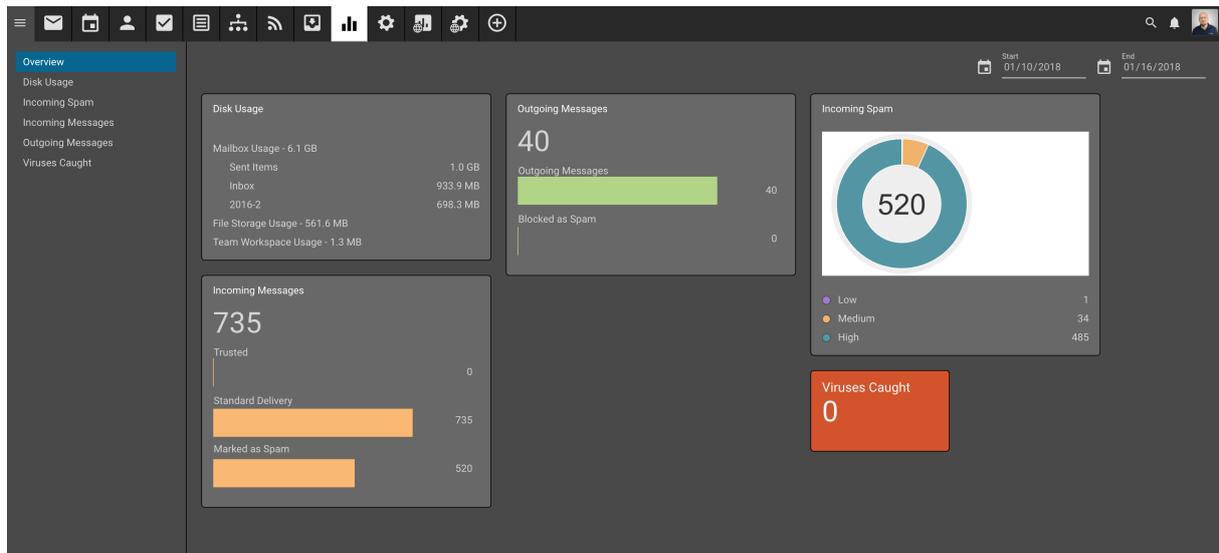
# Reports

## 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.

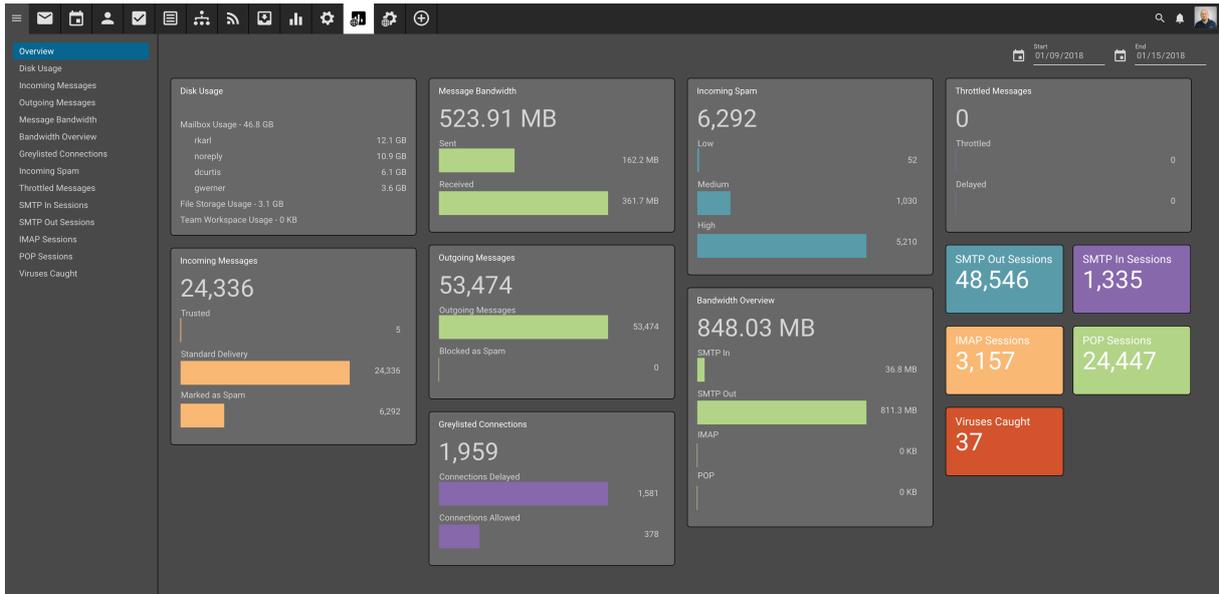
Users have access to a variety of reports that are directly related to their use of SmarterMail. These include disk usage reports that break out the disk space used by both email (by folder) as well as file storage (which includes the space used by files shared through group chat and team workspaces) in addition to a variety of traffic reports, such as incoming and outgoing messages and more.

There is also a dashboard available to users that gives a quick overview of their overall mailbox which includes their incoming and outgoing messages, a breakdown of overall disk usage, and spam counts and viruses caught.



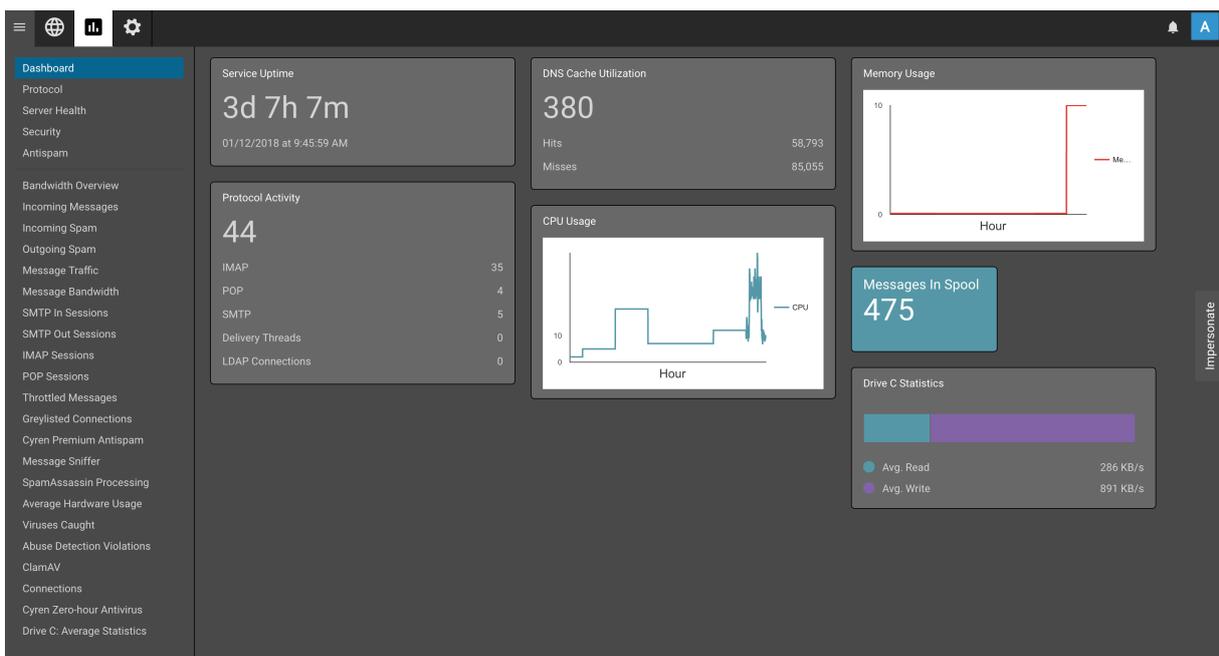
Domain administrators have access to all standard user reports in addition to reports that deal directly with the domain they are managing. For example, trend reports relating to domain traffic as well as spam and virus reports. In addition, domain administrators can change a report's "Mode" to drill to into user statistics.

There is also a dashboard available to domain administrators that gives a quick overview of the domain usage as a whole. This includes the total incoming and outgoing messages, message bandwidth, a breakdown of overall disk usage, spam counts and viruses caught, and much more.



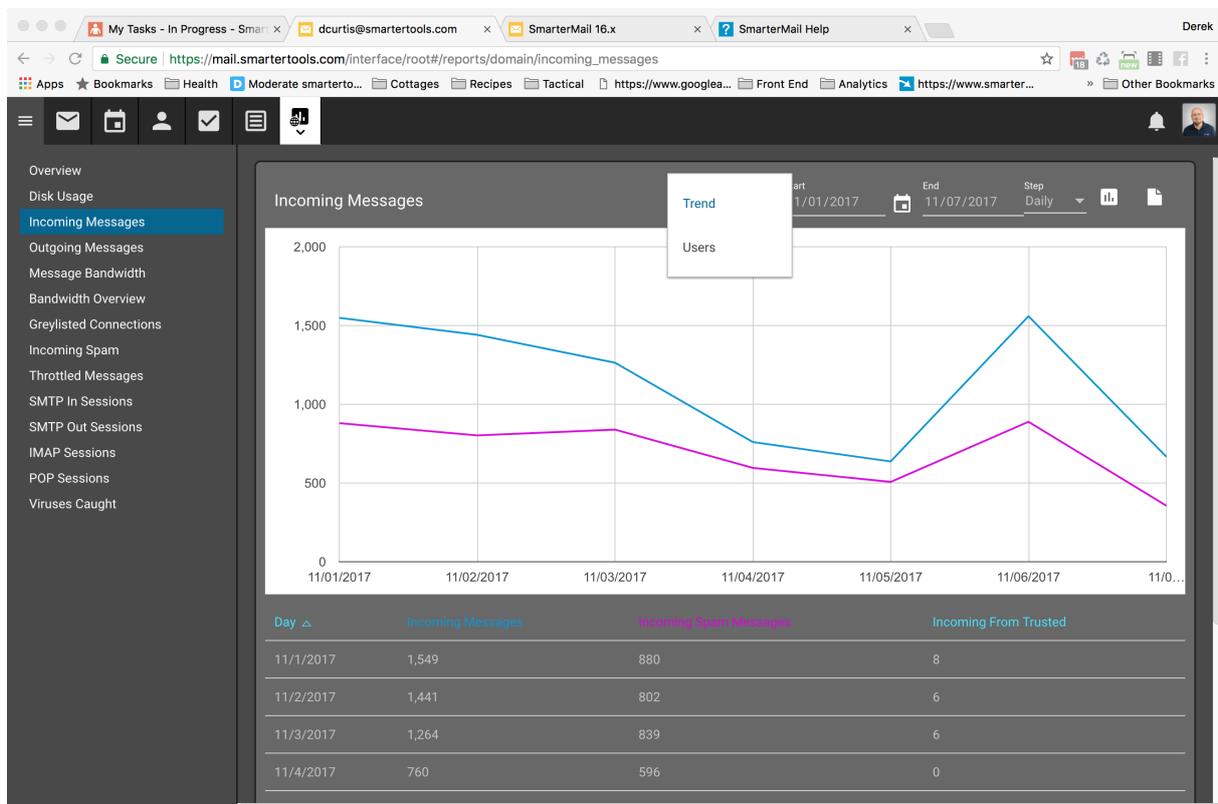
Finally, system administrators have access to a number of system-wide reports that give a detailed overview, as well as minute detail, about the server itself is performing. For example, drive usage and average read/write statistics, memory usage, drive statistics and other server health items. In addition, system administrators can drill down into trend reports to view domain usage reports, then drill down further and view statistics down to the individual user level. In addition, system administrators have access to detailed security reports such as abuse detection reports and information on blacklisted/whitelisted domains.

There is also a dashboard available to system administrators that gives a quick overview of how the server is running as a whole. This includes the uptime for the mail service, CPU and memory usage, drive statistics and much more.



## Trend vs Summary Reports

SmarterMail includes dozens of predefined trend reports and, for domain administrators and system administrators, these trend reports can turn into domain reports (for system administrators) or user reports (both domain and system administrators) by simply changing a report's "Mode". This changes the report from showing the trend to summarizing either by domain or by user. To change the Mode, simply select an option from the dropdown that is to the left of the date ranges selected for each report. See the image, below, for the location. (This is from a domain admin report, so the only option is to view this report as a Trend or by User.)

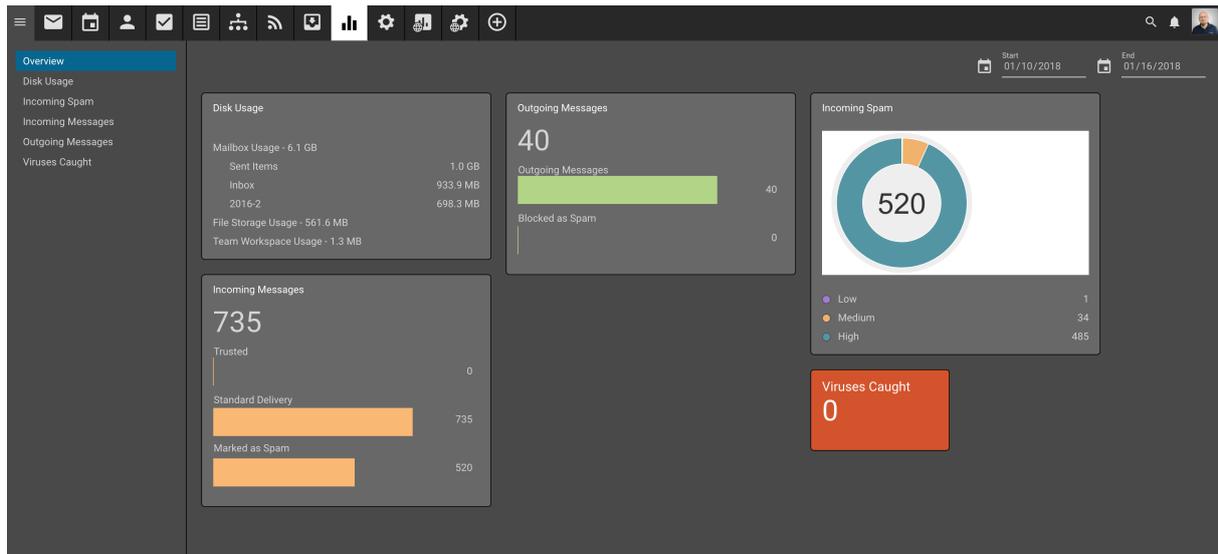


- Trend reports display data points -- connected by trend lines -- for a system, domain, or user over a selected time span. Trend reports are especially useful for determining the usages and performance month-by-month, day-by-day, and hour-by-hour (etc.).
- By changing a report's Mode, a Trend report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

## User Reports

### User Reports Dashboard

In the Reports area, the Overview report is essentially a dashboard that gives users a quick update of certain aspects of their account. This includes point-in-time updates on their incoming and outgoing messages, a breakdown of overall disk usage, and spam counts and viruses caught.



Each card on the dashboard displays:

- **Disk Usage** - The overall disk space being used, which includes message data as well as file storage and Team Workspace storage. The top folders are listed as well.
- **Incoming Messages** - The total number of messages received by the user in the given period. This includes message received from trusted senders, messages delivered via standard delivery and messages marked as spam.
- **Outgoing Messages** - The total number of messages sent by the user in the given period, including a separate item for outgoing messages that were blocked as spam.
- **Incoming Spam** - The total number of messages marked as spam, with a breakdown of the 3 spam levels: High, Medium and Low.
- **Viruses Caught** - The total number of viruses caught and quarantined by SmarterMail for the given period.

### User Disk Usage Report

This report provides a user with an understanding of the overall disk space usage for their account. Each folder the user has for their account is listed along with file storage, showing a user their usage based on the type of item being looked at. A chart is also provided for a visual understanding of

overall usage. As this is an overview of their account usage, it's not possible to view any trend over time.

The following report items are available, and each column is sortable -- ascending or descending -- simply by clicking on the report item's header:

- Folder - The name of the "folder" being returned. This includes default folders and custom folders, as well as folders created in File Storage and Team Workspaces. As an aside, embedded folders are listed as Parent/Child. So, if you have a parent folder called "Sales" that has a "Bids" sub-folder, it would show up as Sales/Bids.
- Type - The type of folder: either Mail or File Storage.
- Percent of Total - The percentage of the overall total that is being used by that folder.
- Disk Usage - The total disk space being used for that folder, in either KB or MB.

## Incoming Spam

This report tells you the number of spam messages which you received, by tolerance level, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period, for each spam level identified.

A user can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Users can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

The following report items are available:

- Day - The date the messages were received.
- Spam Low - The total number of messages received with a low spam tolerance level.
- Spam Medium - The total number of messages received with a medium spam tolerance level.
- Spam High - The total number of messages received with a high spam tolerance level.
- Spam Total - The total number of messages received with any spam tolerance level assigned to it.

## Incoming Messages

This report tells you the number of messages which you received, by message type, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period, for each message type that's identified.

A user can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Users can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

The following report items are available:

- Day - The date the messages were received.
- Incoming Messages - The total number of messages received that are NOT spam or NOT from a Trusted Sender .
- Incoming Spam Messages - The total number of messages received that were marked as spam.
  
- Incoming from Trusted - The total number of messages received that were sent from a Trusted Sender.

## Outgoing Messages

This report tells you the number of messages which you sent for whatever time period you specify. There is also a handy chart that displays the trendline for the time period, for each message type that's identified.

A user can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Users can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

The following report items are available:

- Day - The date the messages were sent.
- Outgoing Messages - The total number of messages sent that are NOT spam.
- Outgoing Spam Messages - The total number of messages you sent that were marked as spam.

## Viruses Caught

This report tells you the number of viruses that were received through email and caught by the virus protection set up by your system administrator for whatever time period you specify. There is also a handy chart that displays the trendline for the time period.

A user can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Users can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

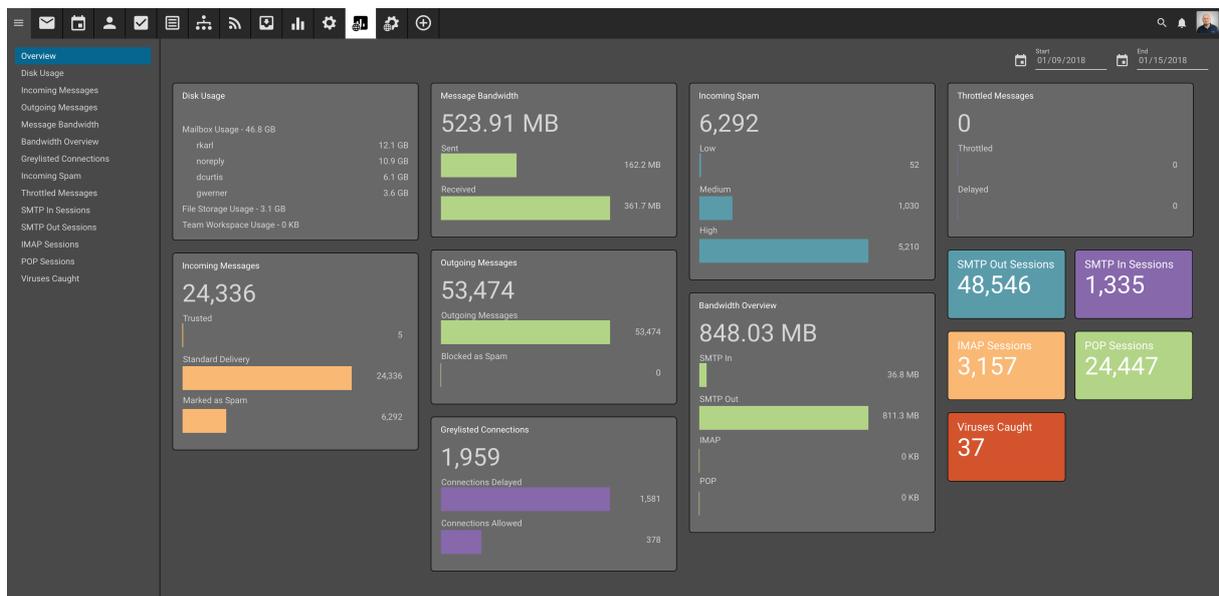
The following report items are available:

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

## Domain Admin Reports

### User Reports Dashboard

In the Reports area, the Overview report is essentially a dashboard that gives users a quick update of certain aspects of their account. This includes point-in-time updates on their incoming and outgoing messages, a breakdown of overall disk usage, and spam counts and viruses caught.



Each card on the dashboard displays:

- Disk Usage - The overall disk space being used, which includes message data as well as file storage and Team Workspace storage. The top users are listed as well.
- Incoming Messages - The total number of messages received by the user in the given period. This includes message received from trusted senders, messages delivered via standard delivery and messages marked as spam.
- Outgoing Messages - The total number of messages sent by the user in the given period,

including a separate item for outgoing messages that were blocked as spam.

- Message Bandwidth - The total bandwidth used for incoming and outgoing messages.
- Greylisted Connections - The total number of connections that were greylisted, and thereby delayed, as well as the total number messages that bypassed greylisting.
- Incoming Spam - The total number of messages marked as spam, with a breakdown of the 3 spam levels: High, Medium and Low.
- Bandwidth Overview - The total bandwidth used, by protocol, for the time period selected.
- Throttled Messages - The total number of messages throttled and delayed.
- SMTP Out Sessions - The total number of outgoing messages for the time period selected.
- SMTP In Sessions - The total number of incoming messages for the time period selected.
- IMAP Sessions - The total number of IMAP sessions for the time period selected. These would be messages received via an email client or outside service using the IMAP protocol.
- POP Sessions - The total number of POP sessions for the time period selected. These would be messages received via an email client or outside service using the POP protocol.
- Viruses Caught - The total number of viruses caught and quarantined by SmarterMail for the given period.

## Domain Disk Usage Report

This report provides a domain administrator with an understanding of the overall disk space usage for the domain as a whole, broken down by each individual user. Each folder the user has for their account is listed along with file storage, showing a user their usage based on the type of item being looked at. A chart is also provided for a visual understanding of overall usage. As this is an overview of their account usage, it's not possible to view any trend over time.

The following report items are available, and each column is sortable -- ascending or descending -- simply by clicking on the report item's header:

- User - The name of the owner of the mailbox. Clicking on the User name will open a new report that will display a breakdown of the file storage for that particular user.
- Last Login - The date of the user's last login to the webmail interface.
- Percent of Total - The percentage of the overall total that is being used by that user.
- Disk Usage - The total disk space being used for that user, in either KB or MB.
- Disk Space Limit - The total amount of disk space allocated for the particular user. If the disk space is unlimited, an infinity sign is displayed. ( $\infty$ )

## Incoming Messages

This report tells you the number of messages which all users of the domain received, by message type, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period, for each message type that's identified.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The date the messages were received.
- Incoming Messages - The total number of messages received that are NOT spam or NOT from a Trusted Sender .
- Incoming Spam Messages - The total number of messages received that were marked as spam.
- Incoming from Trusted - The total number of messages received that were sent from a Trusted Sender.

## Outgoing Messages

This report tells you the number of messages which were sent by all users of the domain for whatever time period you specify. There is also a handy chart that displays the trendline for the time period, for each message type that's identified.

A domain admin can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The date the messages were sent.
- Outgoing Messages - The total number of messages sent that are NOT spam.
- Outgoing Spam Messages - The total number of messages you sent that were marked as spam.

## Message Bandwidth

This report tells you the total bandwidth used by all users of the domain for whatever time period you specify. There is also a handy chart that displays the trendline for the time period for both incoming and outgoing bandwidth.

A domain admin can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The date the messages were sent.
- Data Sent - The total bandwidth used for outgoing messages.
- Data Received - The total bandwidth used for incoming messages.

The primary benefit of this report is when tracking down email abuses. If a particular day shows a significant amount of bandwidth used for sending messages, there's a good possibility that either a user is spamming the server or that a user account was compromised. If a day shows a significant amount of bandwidth used, the domain admin can change the report's Mode and pull up the list of mailboxes to further troubleshoot which user is causing the increased load.

## Bandwidth Overview

This report tells you the total bandwidth used by all users of the domain, per protocol, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period for both incoming and outgoing bandwidth.

A domain admin can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a

quarery report would need a full 3 months selected.) Domain admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The date the messages were sent.
- SMTPIn - The total bandwidth used for incoming messages.
- SMTPOut - The total bandwidth used for outgoing messages.
- IMAP - The total bandwidth used for IMAP traffic. This is generally bandwidth used by email clients connected to the mailbox using IMAP as the connection method.
- POP - The total bandwidth used for IMAP traffic. This is generally bandwidth used by email clients connected to the mailbox using POP as the connection method.

The primary benefit of this report is when tracking down email abuses. If a particular day shows a significant amount of bandwidth used for sending or receiving messages, there's a good possibility that either a user is spamming the server or that a user account was compromised. If a day shows a significant amount of bandwidth used, the domain admin can change the report's Mode and pull up the list of mailboxes to further troubleshoot which user is causing the increased load. Understanding "how" the bandwidth is being used -- for example, if IMAP shows a significant increase for a particular user -- makes it easier for an admin to track down what exactly is happening and where.

## Greylisted Connections

This report tells you the number of allowed connections and delayed connections for all messages sent to the domain, for whatever time period you specify. Delayed connections would be those that were greylisted, meaning there was a slight delay between when the message was sent and when it was actually delivered. There is also a handy chart that displays the trendline for the time period.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarerly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The day of the week covered by the report.
- 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 - The total number of connections made to a particular domain. (I.e., SMTP, POP, IMAP, etc.)

## Incoming Spam

This report tells you the number of spam messages which were received at different tolerance levels for your specific domain. There is also a handy chart that displays the trendline for the time period. There is also a handy chart that displays the trendline for the time period.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- Spam Low - The total number of messages received with a low spam tolerance level.
- Spam Medium - The total number of messages received with a medium spam tolerance level.
- Spam High - The total number of messages received with a high spam tolerance level.
- Spam Total - The total number of messages received with any spam tolerance level assigned to it.

## Throttled Messages

This report shows the number of messages that have been throttled for the domain, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

Domain administrators may use this report to identify issues with high usage customers. For example, if a user is sending a high number of messages, and is, therefore, hitting a throttling threshold, that is an unnecessary use of system resources that can be easily corrected.

The following report items are available:

- Day - The date of the reported throttling.
- Throttled - The total number of messages throttled by the server.
- Delayed - The total number of messages that were delayed -- or not sent out immediately -- due to a throttling violation.

## SMTP In Sessions

This report tells you the number of connections plus the different types of issues reported from SMTP incoming mail for your specific domain. Domain administrators may use this report to identify high usage accounts, or accounts that have seen particular types of issues. This information can be used to evaluate whether to move such accounts to another server or to set limits on such accounts.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The day of the week covered by the report.
- New Connections - The total number of overall, incoming connections to the mail server on

that day.

- Blocked Connections - The number of incoming connections blocked due to IDS rules, SMTP blacklist, blocked senders, etc.
- Bad Commands - The total number of connections that had invalid SMTP commands, poor syntax, etc.
- Terminations - The total number of permanent errors for incoming messages due to spam weight, too many recipients, bad commands, etc.
- Bandwidth - The total amount of bandwidth used for all connections.

## SMTP Out Sessions

This report tells you the number of connections plus the different types of issues reported from SMTP outgoing mail for your specific domain. Domain administrators may use this report to identify high usage accounts, or accounts that have seen particular types of issues. 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 accounts because the administrator would see a jump in outgoing SMTP connections over time, and possible a jump in errors.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The day of the week covered by the report.
- New Connections - The total number of overall, outgoing connections from the mail server on that day.
- Blocked Connections - The number of outgoing connections blocked due to IDS rules, SMTP blacklist, blocked senders, etc.
- Bad Commands - The total number of connections that had invalid SMTP commands, poor syntax, etc.
- Terminations - The total number of permanent errors for outgoing messages due to spam weight, too many recipients, bad commands, etc.
- Bandwidth - The total amount of bandwidth used for all connections.

## IMAP Sessions

This report tells you the number of connections plus the different types of issues reported for clients or other services connected to user accounts using the IMAP protocol. Domain administrators may use this report to identify high usage accounts, or accounts that have seen particular types of issues. 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 accounts because the administrator would see a jump in outgoing IMAP connections over time, and possible a jump in errors.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The day of the week covered by the report.
- New Connections - The total number of IMAP connections from the mail server on that day.
- Blocked Connections - The number of IMAP connections blocked due to IDS rules, SMTP blacklist, blocked senders, etc.
- Bad Commands - The total number of IMAP connections that had invalid SMTP commands, poor syntax, etc.
- Terminations - The total number of permanent errors for IMAP messages due to spam weight, too many recipients, bad commands, etc.
- Bandwidth - The total amount of bandwidth used for all IMAP connections.

## POP Sessions

This report tells you the number of connections plus the different types of issues reported for clients or other services connected to user accounts using the POP3 protocol. Domain administrators may use this report to identify high usage accounts, or accounts that have seen particular types of issues. 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 accounts because the administrator would see a jump in outgoing POP connections over time, and possible a jump in errors.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain Admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

- Day - The day of the week covered by the report.
- New Connections - The total number of POP connections from the mail server on that day.
- Blocked Connections - The number of POP connections blocked due to IDS rules, SMTP blacklist, blocked senders, etc.
- Bad Commands - The total number of POP connections that had invalid SMTP commands, poor syntax, etc.
- Terminations - The total number of permanent errors for POP messages due to spam weight, too many recipients, bad commands, etc.
- Bandwidth - The total amount of bandwidth used for all POP connections.

## Viruses Caught

This report tells you the number of viruses that were received through email for all users of the domain and caught by the virus protection set up by the system administrator, for whatever time period you specify. There is also a handy chart that displays the trendline for the time period.

A domain administrator can change the dates of the report as well as the "Step", which means whether you want to see the report by hour, day, week, month or quarter. (Based on the start and end dates -- so a quarterly report would need a full 3 months selected.) Domain admins can change the chart type by clicking the chart icon next to the date, or even export the report as needed. Each column in the report is sortable, either ascending or descending, and the sort can change simply by clicking the column header.

Domain admins can also switch the report from a "Trend" report, which shows the data for the domain as a whole, to display information by User. This is called the report's "Mode".

The following report items are available:

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

## Settings

### User Settings

#### Account Settings

The Account Settings section contains basic configuration options for a user's account, including their forwarding and reply-to addresses, webmail preferences and more.

To access your personal account settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Account in the navigation pane. The following options will be available:

#### User

- Language - The language in which the interface is displayed. Note: The options displayed here are dependent upon the translation files the SmarterMail Administrator has added to the mail server. Furthermore, SmarterMail translation files are provided by product users, and SmarterTools makes no warranty on the correctness of the translation.
- Time Zone - The time zone of your location. This field determines the timestamp for items within the interface, including the date and time messages were received or a Note was updated.
- Reply-To Email Address - Reply-To Email Address - The email address used in the reply-to header for messages. This address will be used when the recipient replies to a message that was sent via webmail. Note: Only messages sent via webmail will include the reply-to address. If you use an email client that supports a reply-to address, the configuration must be made there as well.
- Recovery Email Address - The email address to which password reset instructions will be sent if you forget your account password. This address should be separate from the SmarterMail account, such as a Gmail or Yahoo! address, or even the default email address of a Domain Administrator. Note: The backup email address can only be used if the System Administrator has enabled password retrieval for the login page.
- Plus Addressing - Plus addressing allows users to automatically sort incoming email without creating content filtering rules first. One of its major benefits is that it allows users to generate special email addresses if they do not want to give out their real 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 following address: `user+technewsletter@example.com`. When the newsletter is delivered, it can automatically be routed to the Technewsletter folder. If the folder does not already exist, it can be created automatically. In addition, if you include the "/" character in your plus address, you can automatically create subfolders. 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. Note: For plus addressing to work, the plus (+) sign is required AFTER the username but BEFORE the domain name. For example, `username+foldername@domain.com`).

- Disabled - Select this option to turn off plus addressing for your account.
- Move to Folder - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, it will be created automatically. Note: To prevent abuse, no more than 10 folders can be auto-created in this method during a six hour period.
- Move to Folder (If Exists) - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, the email will be placed in the Inbox.
- Leave in Inbox - The incoming message will be placed in the Inbox.
- Disable Greylisting - Greylisting is a spam prevention method that temporarily rejects any email from an unrecognized sender. Select this option to disable greylisting for your account. Note: This option will only be available if the System Administrator has enabled users to override greylisting.

## Notifications

Browser notifications allow your browser to alert you about common activity within SmarterMail, even if your browser window is minimized or hidden behind other screens. Note: In order for browser notifications to work, your browser must be running and logged into a SmarterMail site.

A request to enable browser notifications will appear upon your first login to SmarterMail, when using a new browser or after clearing your standard browser's cookies. If your Account Settings page shows the message:  Browser notifications have been disabled in this browser,  it means that you have denied the request to push these alerts. Instructions on how to enable notifications for a site vary with each browser, so we encourage reviewing your browser documentation for the exact steps.

The following alerts can be enabled or disabled for browser notifications.

- Calendar reminders - Enable or disable notifications for calendar appointments that have a reminder enabled.

- Chat messages - Enable or disable notifications when a chat message is received from SmarterMail's standard Chat section or a Team Workspace.
- New emails - Enable or disable notifications when an email is received in your Inbox.

## Webmail

- Theme - Specify the general color theme of the SmarterMail interface: Light or Dark.
- 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.
  - 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.
  - Compose Font - Specify the default font for emails by selecting an option from the list.
  - Compose Size - Specify the default font size for emails by selecting an option from the list.
  - Default From Address - Select the email address that you reply from by default for messages sent through webmail. Your SmarterMail email address and any domain aliases or SMTP accounts configured for your account will be shown in this list. (This setting does not prevent you from manually changing the Send From address when composing a message.)
  - Preview Pane - To specify where the preview pane displays in the webmail interface, select the appropriate option from the list: Right, Bottom or None. By default, the preview pane appears to the right of the messages list. 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.
  - Use To: address for replies - When enabled, replying to a message via webmail will use that email's To: field as the Send From address of your reply, regardless of whether the message was sent to your SmarterMail email address or a domain alias, email alias, SMTP account, disposable address or plus address. For example, if an email is sent an alias you are part of,

replies to that email via webmail will automatically use the email alias address as your Send From address. (This setting does not prevent you from manually changing the Send From address when composing a message.)

- Request read receipts by default - Enable 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.
- Mark messages downloaded by POP as read - Enable this option to mark all messages that are downloaded via a POP3 connection as read.
- Allow Remote Content - Enable this option to automatically display all in-line remote content when an email is viewed. (Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in the message.) When this is enabled, you will not have to manually display the remote content on emails you receive; it will be visible automatically. Note: Emails from trusted domains and senders will always display remote content automatically.
- Remote Content Exceptions - Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in the message. If Allow Remote Content is disabled, you can enter the email addresses or domains (one entry per line) whose in-line remote content should be displayed automatically. If an email address is entered, emails received from that address will automatically display all remote content. If a domain is entered, remote content that comes from a source containing that domain will be automatically displayed. For example, if "smartertools.com" was entered in this field, remote content from a source of "https://images.smartertools.com" would be automatically displayed, even if that email was sent from user@example.com. (If an exception for an email address is added from an email directly, that email address will be listed here.) Note: Emails from trusted domains and senders will always display remote content automatically.

## Forwarding

- Forwarding Address - The email address to which messages sent to your mailbox will be automatically forwarded. Note: Messages routed to other email folders via content filters or plus addressing will also be forwarded to this address.
- Forward 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.

- Delete messages when forwarded - Enable this option to delete messages from your SmarterMail mailbox after they are forwarded.

## Changing your Password

To change the password used to log into your SmarterMail account, click on the Actions (...) button and then Change Password . In order to protect your account security, you will be required to enter the current account password before entering the new one.

If your SmarterMail account credentials are handled in Active Directory or if you do not have permission to change your password, you will need to contact your domain or system administrator for assistance. Depending on who manages your SmarterMail email services, this could be the IT department of your company or a third-party hosting company / ISP.

## Account Profile

The Account Profile section contains basic details for a user, including their name, birthday, email address(es), work information and more. If a System Administrator has enabled the Global Address List (GAL), the information contained in a user's account profile will be publicly available to all other users on the domain. Users can access that public contact information only by accessing the GAL through webmail or LDAP. Note: LDAP is a feature available to SmarterMail Enterprise users only.

In addition, much of the information configured in a user's Account Profile is also available as a variable that can be used when Domain Administrators create domain level signatures.

To access your account profile information, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Profile in the navigation pane. The following options will be available:

- Personal Info - Upload a profile picture and specify your display name, title, first name, middle name, last name, suffix, home page, instant messenger ID, date of birth and any additional notes.
- Phone Numbers - Specify your home, work or mobile phone numbers, pager number and personal or company fax numbers.
- Email Addresses - Specify any additional email addresses.
- Home Address - Specify your home address, including your street address, city, state/province, postal code and country.
- Work Address - Specify your work address, including its street address, city, state/province, postal code and country.

- **Work Info** - Specify your work information, including your company name, job title, department, office, and website URL.

Note: To upload a new profile picture, click on the avatar or current image. Uploading a profile picture will automatically update your avatar in the webmail interface. However, profile pictures are not updated in any third-party chat clients, like Adium or Pidgin, until you 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.

## 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, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Signatures in the navigation pane. The following settings will be available:

## Signatures

To create a new signature, click **New Signature** . Then enter a friendly name and the content that should be appended to each message. Using the **Custom Variables** button, you can add variables that will pull in account information or other details, such as the current date, your display name, website, etc.

## Mappings

Use this card to assign a signature to your mailbox and any SMTP accounts, email aliases or domain aliases that have been configured for your account. Note: Domain Administrators can enforce signatures on a domain-wide basis for user accounts, domain aliases and email aliases. In such cases, you may not be able to map a signature to these addresses.

Note: If multiple signatures are available, you can manually adjust the signature used when composing an email via webmail.

## Autoresponder

An autoresponder is a prewritten reply that is automatically sent when an email message is received. These are commonly used to notify senders of a change in contact information or that the recipient is out of the office or on vacation. For example, a standard autoresponder message could be: "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)."

To set up an autoresponder, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Autoresponder in the navigation pane. The following items will be available:

### Compose Box

- Subject - The words or phrase that will appear in the subject of the autoresponder message (e.g. Out of Office).
- Message Body - The message that will be automatically sent in reply to email messages. SmarterMail allows users to create HTML formatted autoresponders that can include stylized text, links, images and more.

### Domain Policy

System Administrators can enforce a domain-wide autoresponder exclusion in order to prevent SmarterMail from sending autoresponder replies to spam messages. The autoresponder policy configured for your domain will be displayed here.

### Options

- Enable Autoresponder - Toggle the slider to the right to turn the autoresponder on.
- Disable responses to indirect mail - By enabling this setting, the autoresponder 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 autoresponder.
- Limit responses to once daily - Toggle the slider to the right to ensure an email address only receives the autoresponder message once per day, even if they send you multiple messages. If you disable this option, every email you receive will trigger your autoresponder message. 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.
- Only send between certain dates - Toggle the slider to the right to specify the date range that your autoresponder will be active. Then set the specified start and end dates and times. This option is particularly helpful for planned absences, like a vacation or extended holiday.

## Calendar Settings

SmarterMail gives users several customized settings for how they want calendars to appear. This includes the default timeframe to display, the location used for displaying weather forecasts, calendar auto clean rules and more.

To view your calendar settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Calendar Settings in the navigation pane. The following options will be available:

### Options

- **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.
- **Zip Code for Weather** - U.S. users can view the 7-day weather forecast in their area, or any area they choose, on their calendar. To enable this option, enter your postal code in the field. Weather forecasts are provided by the National Weather Service.
- **Add invites as tentative appointments** - Select this option to enable tentative appointments. When enabled, a meeting invite will automatically add a tentative appointment to your calendar, indicated by a dotted outline. You can then either accept or decline the invitation. (Tentative appointments will still trigger the reminder notification that was set by the organizer.)
- **Display weekends** - Select this option to include weekends in your calendar. Because some people only use their calendars for the "business week," disabling weekends can help to keep a 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.

Note: Even though tasks may be displayed 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.

### Business Hours

SmarterMail allows users to customize new calendar appointments to display their typical hours. For example, if you typically schedule appointments from 8 a.m. to 5 p.m., you can configure the business

hours to correspond with those times, allowing SmarterMail to automatically scroll your calendar view to those hours. You can configure the visible hours for each day of the week to allow for flexibility in your schedule.

## Events

The Event system in SmarterMail is an incredibly powerful and flexible tool that allows users to automatically perform actions based on specific criteria and remain 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 users that need the information. For example, users can automatically add an additional recipient on messages they send or receive notifications when a task is due or their user disk space has met a certain threshold.

To create or view your account events, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Events in the navigation pane. To create a new event, click New . The following options will be available:

### General

- Event Name - The friendly name of the event.
- Event Status - New events default to a status of Enabled. However, to temporarily stop an event from triggering, you can change the status to Disabled.
- Event Category - The feature to which the event pertains: Email, User or Collaboration.
- Event Type - The occurrence that triggers the event. Each category has several specific event types that can trigger the action.
- User - The user that the event applies to.

### Conditions

Each event type has its own corresponding conditions. The global conditions that are seen across all event types are listed below.

- 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.

### Actions

Each event type has its own corresponding actions. The global actions that are seen across all event types are listed below.

- Send a notification - This option will send a notification to the Notifications window. It can also send a popup browser notification and an email.
- Send an email - This option will send an email to the specified address.

## 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 Email, 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 your folder auto-clean settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Folder Auto-Clean in the navigation pane. The following options will be available:

### Options

If your Domain Administrator has allowed users to override the auto-clean policy for the domain, you will see the following option:

- Override auto-clean settings for this account - Toggle the slider to the right to override the settings established by the Administrator, allowing you to 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 auto-clean settings for the System or Domain Policy, this section will display those auto-clean rules. If you override the auto-clean rules, this section will allow you to view/create your personal auto-clean policy.

To create a new auto-clean rule, click on New Rule .

### 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. Note: Administrators have the option to turn off auto-clean for the Inbox. If your Inbox is not shown in this list, then auto-clean has been disabled for your account.
- Type - This allows you to create rules based on folder Size or by Date.
- When size is great than (MB) - The size the folder needs to reach BEFORE the auto-clean rule will run.
- Reduce to (MB) - The size the folder will be reduced to once the auto-clean rule finishes.

## **Auto-clean by Date**

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

- Folder - This dropdown will show you all folders for your mail account. Note: Administrators have the option to turn off auto-clean for the Inbox. If your Inbox is not shown in this list, then auto-clean has been disabled for your account.
- Type - This allows you to create rules based on folder Size or by Date.
- Days - The number of days old an email can be before it is automatically deleted from the folder.

## **Connectivity**

SmarterMail provides a variety of options that allow users to manage and access third-party, external accounts directly within SmarterMail. To access these settings, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Connectivity in the navigation pane. The following options will be available:

Jump To:

- Cloud Storage - Link to files from services like Google Drive, Dropbox or OneDrive
- Email Retrieval - Download emails from third-party accounts directly into SmarterMail
- SMTP Accounts - Send emails from third-party accounts directly within SmarterMail
- Synchronized Devices - Review the syncing connections for your account
- Mailbox Migration - Importing email, contacts, calendars, tasks, and notes from third-party accounts

## **Cloud Storage**

SmarterMail can connect to third-party cloud storage providers, like Google Drive, Dropbox or OneDrive, so users can generate links to files stored in the cloud while composing emails. This allows users to quickly share files without worrying about attachment size limits on the server or increasing their mailbox size.

Connecting a Cloud Service

To establish a new connection with a cloud storage provider, click **New Provider** . Select the service you wish to connect, then follow the on-screen prompts to complete the process. Once you are connected to a third-party account, you can generate a link to a file stored with that provider by clicking on the **Actions (...)** button while composing an email message. Then click on **Link File** .

Removing a Connected Service

To remove a connected service, or to simply reset the connection, click on the provider from the list of connected services. Then click Delete .

## **Email Retrieval**

These days it's rare for someone to have, and use, a single email address. That's why SmarterMail's Email Retrieval feature is so great: it allows users to access email from another account directly within the SmarterMail Web interface. This 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 Email Retrieval is SMTP Accounts. When used together, users can send and receive email from external accounts directly within SmarterMail.

### Connecting a Retrieval Account

To establish a connection with an external email account, click New Retrieval Task . Several pieces of information are required in order for SmarterMail to connect to the account and start retrieving messages. If these settings are unknown, 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: POP or IMAP.

### **POP Retrieval**

SmarterMail's POP retrieval service will download email messages from the Inbox of another server via POP3 and deliver them to your SmarterMail mailbox. One primary difference between POP and IMAP is that a POP account will generally retrieve the messages then delete them from the originating server. While SmarterMail's POP Retrieval DOES allow you to leave messages on the server, users need to make sure they enable it. Otherwise, POP retrieval will delete the messages from the server after they are downloaded to your mailbox. The other primary difference is that IMAP allows the retrieval of ALL messages in the external mailbox, while POP will only download the contents from the Inbox.

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 navigate to the External Accounts page, click on the retrieval task, then click Retrieve Messages Now in order to check for new messages. If you choose to automatically retrieve messages, you will not need to return to the External Accounts page, as messages would be automatically retrieved every 10 minutes.
- **Destination Folder** - The folder where messages from the external account should be downloaded.
- **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.
- **Require SSL** - Select this option if the connection to the server must be SSL.
- **Enable spam and content filtering** - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server.
- **Test Connection** - Click this button to verify that a connection can be established using the credentials entered.

## **IMAP Retrieval**

SmarterMail's IMAP retrieval service will download email messages from another server via IMAP and deliver them to your SmarterMail mailbox. One primary difference between IMAP and POP is that an IMAP account will leave the original messages on the original mail server by default. The other primary difference is that IMAP allows the retrieval of ALL messages in all folders of the external mailbox, while POP will only download the contents from the Inbox.

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 navigate to the External Accounts page, click on the retrieval task, then click Retrieve Messages

Now in order to check for new messages. If you choose to automatically retrieve messages, you will not need to return to the External Accounts page, as messages would be automatically retrieved every 10 minutes.

- Folder Transfer Method - The method by which SmarterMail imports emails from the server. The advantage of creating an IMAP connection, rather of POP, is that IMAP allows existing folders to be brought into SmarterMail. Users can choose to add their external account folders as root folders or append them as subfolders on an existing SmarterMail folder.
- Requires SSL - Select this option if the connection to the server must be SSL.
- Enable spam and content filtering (Inbox only) - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server.
- Test Connection - Click this button to verify that a connection can be established using the credentials entered.

### Removing a Retrieval Task

To remove a retrieval task, or to simply reset the connection, click on the account from the list of retrieval tasks. Then click Delete .

## SMTP Accounts

These days it's rare for someone to have, and use, a single email address. That's why SmarterMail's SMTP Accounts feature is so great: it allows users to send email from another account directly within the SmarterMail Web interface. This means users can add their Gmail, Hotmail, Yahoo! or any other mail account to SmarterMail so that they can send all of their emails, from a number of different accounts, from within a single interface.

A nice complement to SMTP Accounts is Email Retrieval. When used together, users can send and receive email from external accounts directly within SmarterMail.

### Connecting an SMTP Account

To establish a connection with an external email account, click New SMTP Account . Several pieces of information are required in order for SmarterMail to connect to the account. If these settings are unknown, it's a good idea to contact your IT or Email Administrator with the list below.

When creating a new SMTP account, the following options are available:

- Display Name - The name that should appear in the From field of emails sent using this account.
- 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.

- Encryption - The type of encryption required by the external email server. Many ISPs and service providers require you use SSL to send emails.
- Email Address - The full email address that corresponds to the external email server. For example, `jdoe@example.com`.
- 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.
- 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.
- Test SMTP Connection - Click this button to verify that a connection can be established using the credentials entered.

### Removing an SMTP Account

To remove an SMTP account, or to simply reset the connection, click on the account from the list of SMTP Accounts. Then click Delete .

## Synchronized Devices

In the Synchronized Devices section, a user can review the syncing connections that are configured for their account. SmarterMail Enterprise uses multiple data synchronization technologies to sync account data with email clients and mobile devices, including:

- 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.
- 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](#) .)

### Deleting a Connection

In general, users should not delete a sync connection, as this may cause the device/application to stop functioning with SmarterMail. Deleting a connection is only recommended if you are no longer utilizing that device or if you are experiencing issues and want to completely resync the device's connection to SmarterMail. When reconfiguring a device's connection, you should: 1.) Remove your SmarterMail account from the device. 2.) Delete the connection from the Synchronized Devices section. 3.) Add the account configuration back to the device.

### 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.

## Mailbox Migration

The mailbox migration tool makes switching email providers easy by importing email, contacts and calendars (and tasks and notes, where supported) into SmarterMail from most third-party mail servers.

### Importing Data with Mailbox Migration

To import data from a third-party mail server, click on [Start Migration](#) . Then follow the on-screen instructions to import the email and collaboration data to your SmarterMail mailbox. Depending on the mail server you are migrating from, you may be asked to provide the mailbox protocol (POP or 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 cannot 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:

- For the type of account you're going to migrate, select "Microsoft Exchange".
- For the Server Address , use "mail.office365.com".
- The Domain will be whatever domain you have set up within Office365.
- Your Username is typically just the name of the mailbox...without your domain name appended to it. (E.g., jdoe)
- the Password is just that: the password you use to log into your Office365 mailbox.
- You will need to check the Requires SSL checkbox.
- From there, the rest is easy. Just hit the Start button and your Office 365 information will start importing into SmarterMail.

## Spam Filtering

SmarterMail includes a variety of antispam measures that will help keep a user's inbox free of unwanted mail. In the Spam Filtering section, users can review/configure the spam filtering options and trusted senders for their account. To access the spam filtering configuration, log into SmarterMail and use the Menu icon to navigate to the Settings section. Then click on Spam Filtering in the navigation pane.

In most cases, a System or Domain Administrator has already configured the filtering options for spam messages on your domain. However, if they allow it, you can override those settings to select your own options for filtering out potentially unwanted email.

### Options

- Override spam settings for this account - Toggle the slider to the right to customize the way spam is handled and to override the settings created by the Domain Administrator. If this option is disabled, the domain's default spam filtering policy will be displayed and cannot be edited.

When you override the spam options set by your 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.

### Trusted Senders

Users can add specific email addresses (such as jsmith@example.com) or domains (such as example.com) that will be exempted from spam filtering. This can prevent mail from friends, business associates and mailing lists from being blocked and lets the system know that these messages come

from a trusted source. Note: Email addresses in your contacts are always considered trusted senders. In addition, the email address for messages that you unmark as spam are automatically included on your trusted senders list.

When adding trusted senders, enter only one email address or domain per line break.

## 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, log into SmarterMail and click on the Settings icon . Then click on Content Filtering .

Note: If you have used the Block Sender option in an email header, an Internal Blocked Senders rule will be displayed. Only the list of email addresses and/or domains in this rule can be modified.

To add a new content filter, click New . The following options will be available:

### General

- Name - The friendly name chosen to describe the rule.
- Order - Content filters are executed in the order in which they appear. In addition, when a content filter gets triggered and performs an action on a message, no other content filtering is performed on that message. In this field, enter the position number for your filter. If a filter already exists in the position number that was entered, the filter currently being edited will override that position and existing filters will adjust accordingly.
- Match Type - Because multiple conditions can be configured per content filter, SmarterMail provides the option to require ALL conditions to be met or only ONE of the conditions to be met in order for the rule's action to be triggered. Select the appropriate option from this list.
- Enable wildcards in search strings (\* and ?) - Toggle the slider to the right to enable wildcard functionality. Wildcards can be used to replace a specific word, phrase or character, where a question mark (?) represents a single character and an asterisk (\*) represents any text. For example, if you wanted to block sales01@domain.com, sales02@domain.com and sales03@domain.com, you could enter sales??@domain.com . If you wanted to block all sales addresses, you could enter sales\* instead.

## Conditions

Click on New Condition to specify the criteria that triggers the rule's action(s). For each condition selected, you will be able to add specifications and enter any necessary details, as required. For example, if you choose to filter on 'From Address', you can enter one or multiple email addresses. If you choose to filter on 'Contains specific words or phrases', you can enter the specific text and choose to look for that text in an email's subject, message body, header, etc.

On many conditions, you also have the ability to reverse the logic of the criteria item by changing the Comparison selection. For example, imagine you only want to accept email from specific domains. You would choose the 'From specific domains' condition and set the Comparison field to 'Does Not Match'. Any messages sent from domains that do not match what you've entered in the text box can be deleted.

Note: If you select a condition that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following conditions are available, separated by Condition Type:

### 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

- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated
- Message over size
- Message under size
- Received in date range
- Sent through a specific server (by IP address)
- Spam probability

## Actions

Click on New Action to specify what should occur when an email triggers the content filter condition(s). Note: If you select an action that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following actions are available:

- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: Messages deleted through content filtering cannot be recovered.
- Reroute message - Forwards the message to another email address. Unlike 'Copy message', this option will not store a copy of the email in your own account.
- 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 dropdown list. Note: If you later delete that folder and leave the content filter active, the filter will

automatically create the folder when the action is triggered.

- Add Header - Adds an email header within the incoming message, which can be useful when performing additional filtering through Outlook or another email clients. Headers should be formatted like "X-someheadername: value"
- Prefix subject - Appends 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 text box.
- Copy message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- 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.
- Set Priority - Automatically elevates 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.
- Flag message - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.

## Domain Settings

### General Domain Settings

This settings page is only available to Domain Administrators.

Below are the options available for managing and configuring a domain. To access the domain settings, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on General in the navigation pane. The following options will be available:

Jump To:

- Domain Aliases - Add an alternate domain name for users on the domain
- User Options - Adjust settings that apply to users on the domain
- External Help - Add a button to the Help menu
- Login Display - Customize the login page for your domain
- Logout URL - Set a special page to load on logout
- Footer - Add a message footer that appends all outgoing messages
- Email Signing - Protect users from phishing schemes and spam attacks
- Attachments - Manage the incoming and outgoing extension blacklist
- Mailing Lists - Set the Bounces Before Removal threshold for mailing lists

## Domain Aliases

A domain alias is basically an alternate domain name for one that already exists in SmarterMail.

Domain aliases are useful, as they allow companies with multiple domain name extensions to receive any email sent to one of their domains directly within SmarterMail. For example, imagine you have a domain, 'example.com' with a user configured under 'user@example.com'. By adding a domain alias for 'example.net', any email sent to 'user@example.net' will be delivered to 'user@example.com'.

Note: You must own the domain name in order to create a domain alias. In addition, messages cannot be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.

### Creating a Domain Alias

To create a new domain alias, click **New Domain Alias** . Then enter the name of the alternate domain. The name will be used to create the domain alias email address. For example, if the name of the alias is "example2.com", the domain alias email address will be user@example2.com.

Note: By default, before a Domain Administrator can save a domain alias, SmarterMail will check that the mail exchange record for the domain is pointing to the server. This prevents Domain Admins from "hijacking" mail from valid domains. For example, if this check were not in place, a Domain Admin 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. Alternatively, System Administrators who impersonate a domain will see an option when adding a domain alias on whether to verify the MX record before saving.

## User Options

- **Include mailing lists in the Global Address List** - The Global Address List (GAL) is basically a listing of all users who have accounts for your particular email domain. By toggling the slider to the right, any mailing lists that have been 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.
- **Include aliases in the Global Address List** - The Global Address List (GAL) is basically a listing of all users who have accounts for your particular email domain. By toggling the slider to the right, any aliases that have been created will appear as a contact in the Global Address List. By default, this is enabled, 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.
- **Show calendar availability for all users in domain** - This setting is enabled by default and

allows SmarterMail to alert users of any scheduling conflicts when adding a member of the Global Address List as an attendee on a calendar appointment. In addition, this allows users to view an Availability window to review the times that their attendee is free/busy. When disabled, domain users' scheduling information will not be displayed in the appointment window.

## External Help

Note: This section will only be visible if the System Administrator has enabled Login Display Customization for the domain.

- 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.
- Custom Help Text - The hyperlink text for the custom URL in the Help menu. Note: If no text is entered in this field, the hyperlink text in the Help menu will default to "External Help".

## Login Display

Domain Administrators can customize the SmarterMail login page for their domain 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 section 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 server.

- Image for Login Screen - Upload an image, like a company logo, by dragging and dropping a file in the highlighted area or clicking to browse for a file (max file size of 3mb). Uploading an image 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 remain 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.
- Custom Login Text - Use this field to adjust the default "Log into SmarterMail" text with something more in line with an overall brand message.
- Enable custom login page HTML - Toggle the slider to the right to enable the ability to use HTML to further modify the login screen to add additional text or adjust the layout.

- 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 Image for Login Screen, the div id "companyinfo" must be included. In addition, Domain Administrators cannot enter scripts as this is considered to be unsafe code; however, System Administrators do not have this limitation.

## Logout URL

In most cases, when a user logs out of SmarterMail, they are taken back to the standard login screen. However, Administrators can enforce a logout redirect for all users on the system (like to an Intranet page or company site) or allow Domain Administrators to enforce their own policies. In this section, the system policy will be displayed.

If the Administrator has allowed it, you can toggle the slider to the right to Override System Settings , then enter a unique logout URL for the domain in the Logout URL text box.

## Footer

If the Administrator has enabled footer customization for the domain, Domain Administrators can configure server-wide message footers that SmarterMail will append on all incoming and outgoing messages. Although similar to signatures, message footers are typically used to convey disclaimers or provide additional information. For example, an administrator may want every message to include a notice that the message was scanned for viruses or the text "Sent by SmarterMail."

The following options will be available:

- Override footer settings for this domain - Toggle the slider to the right to customize the footer for your domain.
- Enable footer for all messages - Toggle the slider to the right to add the footer message to all incoming and outgoing messages.
- Apply to mailing lists - By default, footers are not applied to emails posted to mailing lists. To add the footer to mailing list emails, toggle the slider to the right. Note: Mailing lists have their own configurable footers. If a custom mailing list footer is already configured, enabling this option will append a second footer at the end of each message posted to the mailing list subscribers. Because this may be confusing for mailing list moderators and recipients, most administrators will choose to keep this option disabled.
- Footer - Use this section to create the message footer text. Clicking the edit icon will open a modal that includes an HTML-based editor, allowing admins to create footers that seamlessly fit into any email message. Note: The message footer does not support the use of variables.

## Email Signing

Email signing protocols can be used to protect users from phishing schemes or spam attacks. For example, DKIM signing uses cryptography to verify the authenticity of a message, ensuring the message came from your server and was not changed in transit. To enable DKIM Signing, click the Enable button. SmarterMail will display a unique Text Record Name and Text Record Value. You will need to contact your DNS provider and add the TXT record to your DNS server. After the TXT record has been added to DNS, click on the Enable button once again. SmarterMail will attempt to verify the DNS settings and DKIM Signing will be enabled.

To view the Text Record Name and Value, click on View Record . To adjust the mail signing settings, click the Settings button. Note: In most cases, these settings do not need to be altered. However, in the event that you would like to specify how closely you want the system to monitor messages in transit, please refer to the DKIM documentation linked below.

- Body Canonicalization - The method used to monitor in-transit changes to the body of a message. Two canonicalization algorithms are defined for the body: a "simple" algorithm that tolerates almost no modification and a "relaxed" algorithm that tolerates common modifications such as whitespace replacement and header field line rewrapping. For more information, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .
- Header Canonicalization - The method used to monitor in-transit changes to the header of a message. Two canonicalization algorithms are defined for the header: a "simple" algorithm that tolerates almost no modification and a "relaxed" algorithm that tolerates common modifications such as whitespace replacement and header field line rewrapping. For more information, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .
- Header Field to Use - The header fields included in the hash algorithm. This is further defined by header fields. For assistance in determining the header fields to sign, please visit <http://dkim.org/specs/rfc4871-dkimbase.html#canonicalization> .
- Header Fields - The header fields included in the hash algorithm. Note: List only one header field per line break.

## Attachments

- Incoming Extension Blacklist - This list allows you to limit the file types that can be attached to emails sent to users on your domain. For example, many email administrators won't allow executable files (EXE) as they can cause issues on the mail server, and possibly across an entire network. To add a blacklisted file type, simply type in the file extension, one per line. (E.g., .exe or EXE)
- Outgoing Extension Blacklist - This list allows you to limit the file types that are users on your

domain are allowed to send out of the mail server. For example, many email administrators won't allow batch files (BAT) as they can cause issues on the recipients' mail server, and possibly across their entire network. To add a blacklisted file type, simply type in the file extension, one per line. (E.g., .bat or BAT)

## 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 card to specify the following mailing list setting:

- Bounces Before Removal - The number of times a message to a specific subscriber may bounce before the subscriber is automatically removed from the mailing list.

## Accounts

### Users Overview

This settings page is only available to Domain Administrators.
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The Users section is where a Domain Administrator can manage the user accounts on their domain. This document explains the actions that can be taken on user accounts, including the ability to set the default user settings and propagate those settings to specific users, import users, improve the search functionality for a user by reindexing their account, and more.

For information on how to add, edit or delete a user account, and for an explanation of the configuration options available for user accounts, please refer to the [Managing Users](#) page.

To access the Users section, log in to SmarterMail as a Domain Administrator and click on the Domain Settings icon . Then click on Accounts in the navigation pane. The Users tab will load by default.

Jump To:

- User Defaults and Propagation - Set the default configuration of new users and propagate settings to all or specific users.
- Reindex a User - Improve the search functionality for a user by reindexing their account.
- Expire Password - Force a user to change their password on their next webmail login.
- Import from CSV - Import new user accounts from a CSV file.

- Import from LDAP - Import new user accounts from Microsoft's Active Directory.
- Export All CSV - Export a CSV file of all users on the domain.

## User Defaults and Propagation

For domains that have a large number of users, it can be time consuming to make a change to user permissions and then ensure the right users have the same change applied to their mailboxes. With User Defaults, however, Domain Administrators can create a template for the default user settings so that they only have to make the change in one location, and then propagate those settings to a select few users or each user on the domain. This makes changing settings quick and easy and ensures each user has the exact same permissions and settings applied.

To review the default configuration for new users, click on the User Defaults button. (The default user settings are identical to those found when adding or editing a user. For more information on these settings, refer to the Managing Users page.) Modify and save these settings as desired.

To apply some or all of the default user settings to some or all of the existing users on the domain, click on Propagation . Checkmark the settings to propagate, then select whether to push these settings to specific users or all users on the domain. Then click Propagate.

Note: Making a change to the User Defaults doesn't automatically propagate, so a change to default settings does not change users that are already in place for the domain.

## Reindex a User

If a user reports errors or a lack of results when performing a search, it may be necessary to reindex their user account, which will regenerate the mailbox index file. To reindex one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Reindex .

## Expire Password

This option can be used to expire the password of one or more users, forcing the user(s) to change their account password the next time they log into the webmail interface. To expire the password of one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Expire Password .

Note: If password changes were disabled for a user, expiring the user's password will automatically enable password changes and expire their password. They will be required to set a new password next time they log in. In addition, accounts set to Active Directory authentication cannot be expired.

## Import Users From CSV

To add new SmarterMail users via a CSV spreadsheet, click on the Actions (...) button then click on Import from CSV . Upload the CSV file that contains the user information and click Next . The first page of the import modal will allow you to map the CSV column headers to the appropriate configuration option within SmarterMail. For example, if your CSV contained a column header for "user name", you can select the "Username" mapping.

At minimum, the CSV file must contain a "Username" column header. All remaining account configuration options will mimic the domain's User Defaults template. If no "Password" column header is provided in the CSV, the import modal will prompt you to create a temporary password for the user(s) being imported. Those users will be prompted to change their password the next time they log into the webmail interface.

## Import Users From LDAP

This feature is only available to Domain Administrators using 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.

To add new SmarterMail users via the LDAP protocol, click on the Actions (...) button then click on Import from LDAP . Type in the LDAP Binding String . Enable Use LDAP email as username if you would like the LDAP email to be used as the account username. Click List Users to preview the users that will be imported. Then click Import .

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

## Export All CSV

To export a list of all user accounts on the domain, click on the Actions (...) button then click on Export All CSV . The CSV file will contain a variety of details about the user accounts, including their username, display name, authentication method, home and work address, disk usage, and more.

## Managing Users

This settings page is only available to Domain Administrators.

The Users section is where a Domain Administrator can add, view and modify the user accounts on their domain, where each account represents a person's actual mailbox and email address (ex: jdoe@example.com). Domain Administrators can modify basic configuration options for a user,

including their password method, features they can access, reply-to addresses, webmail preferences and more.

For a better understanding of the actions that can be performed in the Users section, see the Users Overview page.

To access the list of users on your domain, log into SmarterMail as a Domain Administrator and click on the Domain Settings icon . Then click on Accounts in the navigation pane. The Users tab will load by default.

Adding a new user and editing an existing user both deal with the same settings. To create a new user, simply click on the New button. The following initial options will be available:

- Username - The identifier the user uses to login to SmarterMail. This is the portion of the email address that comes before the domain name. For example, the "jdoe" part of jdoe@example.com.
- Authentication Mode - The authentication method used to login to SmarterMail. By default, SmarterMail will use its included username/password authentication. However, SmarterMail can also be integrated with customers using Microsoft Windows Active Directory for their corporate logins. For information on Active Directory integration, visit the SmarterTools Knowledge Base .
- Active Directory Username - If Active Directory is selected for the Authentication Mode, this field will appear. Enter the Active Directory username to authenticate against for Active Directory authentication.
- Domain - If Active Directory is selected for the Authentication Mode, this field will appear. Enter the Domain to authenticate against for Active Directory authentication.
- Password - If SmarterMail is selected for the Authentication mode, this field will appear. Enter the password this user will use to log into their account.
- Confirm Password - If SmarterMail is selected for the Authentication mode, this field will appear. Confirm the password this user will use to log into their account.

After the initial creation of a new user, and when editing an existing user, the following options will be available:

## Account

- Username - The identifier the user uses to login to SmarterMail. To change an account's username, click on the Actions (...) button and then Rename .
- 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.
- Display Name - The friendly name that is displayed on outgoing messages.
- Authentication Mode - The authentication method used to login: SmarterMail or Active Directory. To change a user's password when using SmarterMail verification, click on the Actions (...) button and then Change Password . When using Active Directory, changes to a user's password must be done in the directory itself.
- Active Directory Username - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Active Directory username to authenticate against for Active Directory authentication.
- Domain - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Domain to authenticate against for Active Directory authentication.
- 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.
- Domain Administrator - Toggle the slider to the right to make this user one of the Domain Administrators for the domain, which allows the user to create new users and edit domain-wide settings.

## User

- Time Zone - The time zone to use for marking the sending and receiving date and time.
- 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.
- Recovery Email Address - This is a backup email address that can be used for password recovery information should a user forget their mailbox credentials.
- Plus Addressing - Plus addressing allows users to automatically sort incoming email without creating content filtering rules first. A major benefit of plus addressing is that it allows users to generate special email addresses if they do not want to give out their real 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 following address: user+technewsletter@example.com. When the newsletter is delivered, it can automatically be routed to the Technewsletter folder. If

the folder does not already exist, it can be created automatically. Note: For plus addressing to work, the plus (+) sign is required AFTER the username but BEFORE the domain name. For example, username+foldername@domain.com).

- Disabled - Select this option to turn off plus addressing for the account.
- Move to Folder - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, it will be created automatically. Note: To prevent abuse, no more than 10 folders can be auto-created in this method during a six hour period.
- Move to Folder (If Exists) - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, the email will be placed in the Inbox.
- Leave in Inbox - The incoming message will be placed in the Inbox.
- 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 follows the policy set by the Administrator for the domain. However, you can adjust this policy per user, as needed.
- 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.
- Show in Global Address List - This setting is enabled by default and allows the user account to be displayed in the Global Address List, which is found in the Contact section. This option is useful for only displaying accounts that are tied to real people as opposed to addresses used by departments, such as support@example.com. Note: This option is only available when using SmarterMail Enterprise.
- Enable External SMTP Accounts - Enable 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.

## Temporary Password

This feature is only available to System Administrators.

This feature allows System Administrators who are managing/impersonating the domain to create an additional, temporary user password in order to troubleshoot account issues. 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.

- **Generate** - Click on Generate to create a temporary password. 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 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.

## Webmail

- **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.
- **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.
- **Compose Font** - Specify the default font for emails by selecting an option from the list.
- **Compose Size** - Specify the default font size for emails by selecting an option from the list.
- **Request 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.
- **Mark messages downloaded by POP as read** - Select this option to mark all messages that are downloaded via a POP3 connection as read.

## Forwarding

- Forwarding Address - The email address to which messages sent to your mailbox will be automatically forwarded. Note: Messages routed to other email folders via content filters or plus addressing will also be forwarded to this address.
- Forward 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.
  - Delete messages when forwarded - Select this option to delete messages from your SmarterMail mailbox after they are forwarded.

## Groups

This feature is only available when using SmarterMail Enterprise.

User Groups are used to give a specific subset of users on the domain permission to access shared resources. Use this card to add the user to any existing groups that have been configured for the domain.

## 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 feature on a per user basis to ensure users don't send out massive amounts of email through out the day, thereby possibly getting the domain blacklisted.

- 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.

## Service Access

This card can be used to adjust a user's access to the standard protocols that SmarterMail utilizes. For example, you can limit services like POP, IMAP and SMTP so that specific users are not able to connect their email accounts to external email clients. The following services can be managed for each user:

- Webmail - Enable this option to allow users to log into SmarterMail from the webmail interface.
- POP - Enable this option to allow the user to download mail to an email client using POP3.
- IMAP - Enable this option to allow the user to create a two-way email sync between SmarterMail and an email client using IMAP.
- Incoming SMTP - Enable this option to allow users to receive email from external domains.
- Outgoing SMTP - Enable this option to allow users to send email to external domains.
- Chat XMPP - Enable 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. This setting is only available when using SmarterMail Enterprise.

## 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.

Note: Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address; there is not a mailbox associated with the alias and no email is ever actually stored for the alias itself. Instead, emails are simply sent to the list of addresses provided for the alias and are stored in the mailboxes of the individual users.

To access the email aliases for the domain, log in as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Accounts in the navigation pane and navigate to the Aliases tab .

To create a new email alias, click New . Whether creating a new alias or editing an existing one, the following options will be available:

- Name - The name of the alias. This name will be used to create the email alias address. For example, if you named the alias "info" and your domain is "example.com," the email alias address would be info@example.com.
- Email Addresses (one per line) - Type the full email address(es) of the user(s) who should receive emails sent to this alias.
- Internal use only - Enable this option to only allow emails to be received from addresses within the alias's domain.
- Include all domain users - Enable 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 Addresses text box.
- Allow users to send from this alias - Enable this option to allow users to manually change their Send From address to the email alias address on new emails and replies.
- Show in Global Address List - Enable this option to display the alias in the Global Address List. Note: This feature is only available when using SmarterMail Enterprise.
- Show as a room in chat - Enable this option to allow the alias to appear as a room in chat. Enabling aliases for chat means that instant messages can be sent to the alias from within webmail as well as when using third-party chat clients.
- Use as domain catch-all - Enable this option to use the alias address as a catch-all account for the domain. A catch-all alias is an email address that will catch any incoming email sent to an invalid address on a domain. Instead of bouncing the message back to the sender, the message will be stored in the mailbox that is assigned as the catch-all account. Note: This option will only be visible if the System Administrator has enabled catch-all as a feature for the domain. In addition, only one email alias can be assigned as the domain catch-all at a time. Enabling a different alias as the catch-all will override any assignment already in place.

## 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. Furthermore, it is important to never set an autoresponder on an email account that the catch-all forwards to, as it may result in backscatter, causing additional bandwidth usage and potentially causing your domain to be blacklisted.

## Administrators

This settings page is only available to Domain Administrators.
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The Administrators section is where Domain Administrators can review all of the users on their domain who have Domain Administrator access and can make changes to domain-wide settings. To access the Administrators section, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Accounts in the navigation pane and navigate to the Administrators tab .

At a quick glance, you can see every user on the domain who has Domain Administrator access enabled for their account. You can determine the Primary Administrator (the user account chosen by the System Administrator as the Administrator for this domain), see the last date the administrators logged in and review their disk usage status. Using the New button or clicking on an administrator in this list will open the configuration options for that user account. For more information on the settings available, please refer to the Managing Users page.

It is also important to note that using the Delete button on this page does NOT remove the Domain Administrator access from the user account. Instead, deleting a user from this list will permanently delete the entire user account. To simply remove the Domain Administrator privileges, click on a user to open the account configuration options and and disable the setting for 'Domain Administrator.'

## 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.
- 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.
- User - The individual users you want to add to the user group. Start typing the username and it will be displayed. Simply select it to add it to the User Group. Alisases can not be added to a User Group.

## Mailing Lists

### Mailing Lists | Overview

This settings page is only available to domain administrators.

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

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

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, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Mailing Lists in the

navigation pane. Whether creating a new mailing list or modifying an existing one, the following options will be available:

- Options - Configure the mailing list options and permissions
- Subscribers and Digest Subscribers - Add subscribers who will receive the standard mailing list postings or digest emails.
- Posters - Whitelist email addresses or domains who can post to the mailing list
- Banned Users - Prevent specific email addresses or domains from posting to the mailing list
- Messages - Configure the header and footer for postings as well as the replies sent to listserv commands
- Custom Fields - Customize list postings with subscriber custom fields

## **Variables**

Emails that are posted to a mailing list support the use of the following variables. These variables 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 Messages . Though similar to Custom 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 Mailing List | Options .
- #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.

## Mailing Lists | Options

This settings page is only available to domain administrators.
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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.

## Options

- 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.
- Status - New mailing lists default to a status of Enabled. To temporarily prevent postings to this list, change the status to Disabled.
- 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.
- Description - A brief summary of the mailing list.

## List Settings

- 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
- Webmail URL - The URL for the SmarterMail login page. This setting can be used to override the server's configured hostname for mailing list communications. Note: URLs should include the http:// prefix. For example: <http://mail.example.com/>

## Posting

- Password - To restrict people 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 must add the password to the beginning of the subject line of the email, enclosed by brackets and colons. For example, if "password" is entered into this field, the subject line of the email would need to begin with [:password:].
- 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. Note: Email addresses specified on the Posters tab will override this field.

- **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 only 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.
- **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.
- **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.

## Commands

- **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.
- **Friendly Unsubscribe** - The text entered here will be hyperlinked when using the Unsubscribe variable . If this field is left blank, the unsubscribe link will hyperlink the full URL.

## 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 feature to ensure a mailing list does not send out massive amounts of email through out the day, thereby possibly getting the domain blacklisted.

- **Outgoing Messages per Hour** - The number of messages sent by the mailing list per hour. By default, the number of outgoing messages is 500.
- **Outgoing Bandwidth per Hour** - The total number of MBs sent by the mailing list per hour. By default, the outgoing bandwidth is 50MB.
- **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. Domain 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. By default, mailing lists are set to Delay messages once the threshold has been reached.

## Message Options

- **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 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. This is especially useful for very active lists or lists with a larger number of subscribers.

- **Enable digest mode** - To enable digest mode, toggle the slider to the right. The remaining settings will become available.
- **Subject** - The subject line for the digest email.
- **Trigger Type** - The frequency of the digest emails: Daily, Weekly, Biweekly, Monthly or Manual. If Manual is selected, digest emails will only be sent when using the Send Digest button.
- **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.

## Mailing Lists | Subscribers and Digest Subscribers

This settings page is only available to Domain Administrators.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#).

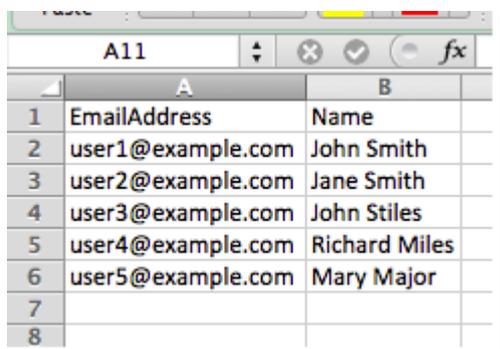
Individuals that sign up to receive messages from the mailing lists are called subscribers. To view a list of the mailing list subscribers, log into SmarterMail as a Domain Administrator and use the [Menu](#) icon to navigate to the Domain Settings section. Then click on Mailing Lists in the navigation pane and open a mailing list's configuration options.

Subscribers are categorized into two sections: the Subscribers tab stores the subscribers for standard mailing list postings and the Digest Subscribers tab stores subscribers for condensed digest emails.

### Adding Subscribers

To add a new subscriber, click on [New](#). Email addresses can be added individually or in bulk, with one email address per line break. Note: When uploading email addresses from Gmail.com, be sure to enter the From address of the email account. If the address contains periods, they must be included in these fields.

To upload a list of subscribers to the mailing list, click on the [Actions \(...\)](#) button, then [Import CSV File](#). 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 Custom Fields for the corresponding subscriber/email address. See example below:



	A	B
1	EmailAddress	Name
2	user1@example.com	John Smith
3	user2@example.com	Jane Smith
4	user3@example.com	John Stiles
5	user4@example.com	Richard Miles
6	user5@example.com	Mary Major
7		
8		

### Managing Subscribers

Once a subscriber has been added to the list, you can modify their custom field values, review the

other mailing lists to which they are subscribed, see the history of bounce messages they've received and reviewed the history of messages they've received.

To download the list of subscribers as a text file, click on the Actions (...), then Export CSV File .

## Mailing Lists | Posters

This settings page is only available to Domain Administrators.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see Mailing Lists Overview .

Domain Administrators can restrict the posting privileges for a mailing list to Anyone, Subscribers Only or Moderators Only. In addition, they can use the Posters section to specify additional whitelisted posters.

To add additional posters to a mailing list, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Mailing Lists in the navigation pane and open a mailing list's configuration options. Then click on the Posters tab .

To add a new poster, click New . Enter the email address(es) of the people who can post messages to the mailing list.

### Uploading/Downloading Subscribers

In addition to manually adding new subscribers, it's possible to upload a text file that contains subscriber emails and any Custom Fields assigned to your subscribers. Text files should be in Comma Separated Value (.CSV) format.

Of course, since you can upload a subscriber list, you can also download one. This is especially convenient if the subscribers for one list -- or a subset of those subscribers -- is interested in another list you start up. Downloading your list subscribers, then editing it if needed, makes it simple to add subscribers to a new list.

### Banned Users

It's also possible to keep a list of users who are banned from posting to your mailing list. You can import subscribers to this list as well as download that list to use in others you've created. For more information, see the section on Banned Users .

## Mailing Lists | Banned Users

This settings page is only available to Domain Administrators.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

Domain Administrators can restrict the posting privileges for a mailing list to Anyone, Subscribers Only or Moderators Only. In addition, they can use the Banned Users section to specify additional blacklisted posters.

To prevent users from posting to a mailing list, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Mailing Lists in the navigation pane and open a mailing list's configuration options. Click on the Banned Users tab .

To add a new banned user, click New . Enter the email address(es) of the people who cannot post messages to the mailing list.

## Mailing Lists | Messages

This settings page is only available to Domain Administrators.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

Domain Administrators can customize the system messages used 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. For more information, please see [Listserv Commands](#) .

Note: Variables can be used in the footer, header and subscribe system messages. For more information on variables, see [Mailing Lists Overview](#) .

To edit a particular message, simply click on it from the list. When you do, a modal opens that will allow you to fully customize the message, as well as how that message is presented using a complete HTML editor. Once you've made your changes, be sure to save them.

- **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).
- `doubleoptinreply` - 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.
- `faildsetdigestmode` - 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 on messages that are sent to list subscribers.
- `header` - This is the header (information 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 particular list. This requires the LIST command to be set.
- `listoflists` - LISTSERV COMMAND ONLY. This returns a list of the mailing lists for a particular domain. This requires the LIST command to be set.
- `maxmessagesizeexceededemail` - 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.

## Mailing Lists | Custom Fields

This settings page is only available to Domain Administrators.

Mailing Lists are a great way to allow users to communicate with a number of different individuals via a single email address. For a complete understanding of how mailing lists work, please see [Mailing Lists Overview](#) .

Mailing lists can utilize Custom Fields in order manage information about subscribers. When a custom field has been created, a value can be applied to a specific subscriber. Then, the custom field is used as a variable in a mailing list message in order to display that custom information about the subscriber. 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 Custom Field then add a value for each subscriber.

To create or manage Custom Fields, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Mailing Lists in the navigation pane. Open a mailing list's configuration options and click on the Custom Fields tab .

### 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. For example, if you enter "First Name" in this field, you will need to enter `#First Name#` as the variable in the mailing list message.
- **Default Value** - Enter the text that should be automatically entered for current and new 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 Custom Fields in Messages

A Custom Field can be used in mailing list messages as a type of custom variable. To enter Custom 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.

## 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.

## Domain Events

This settings page is only available to Domain Administrators.
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The Event system in SmarterMail is an incredibly powerful and flexible tool that allows Domain Administrators to automatically perform actions based on specific criteria and remain up-to-date with what is going on with the SmarterMail server and user accounts. SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to users that need the information. For example, Domain Administrators can automatically add an additional recipient on messages sent

or received by users on the or receive notifications when a task is due or their domain disk space has met a certain threshold.

To create or view events for the domain, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Events in the navigation pane. To create a new event, click New . The following options will be available:

## General

- Event Name - The friendly name of the event.
- Event Status - New events default to a status of Enabled. However, to temporarily stop an event from triggering, you can change the status to Disabled.
- Event Category - The feature to which the event pertains: User, Mailing List, Alias, Throttling, Email or Collaboration.
- Event Type - The occurrence that triggers the event. Each category has several specific event types that can trigger the action.

## Conditions

Each event type has its own corresponding conditions. The global conditions that are seen across all event types are listed below.

- 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.

## Actions

Each event type has its own corresponding actions. The global actions that are seen across all event types are listed below.

- Send a notification - This option will send a notification to the Notifications window. It can also send a popup browser notification and an email.
- Send an email - This option will send an email to the specified address.

## Folder Auto-clean

This settings page is only available to domain administrators.

Setting up auto-clean rules for email folders is a simple, yet effective, way to limit how much of the domain's disk space is taken up by users' Junk Email, 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 for a domain, log into SmarterMail as a Domain Administrator and click on the Settings icon . Then, in the Domain Settings section, click on Folder Auto-Clean . The following options will be available:

Note: Depending on the policies the System Administrator has established, you may or may not be able to adjust the auto-clean settings for a domain.

## Options

- Override auto-clean settings for this domain - Toggle the slider to the right to override the settings established by the System Administrator, allowing you to create your own rules. Any changes you make will not be affected if the administrator changes their policy, unless they disable domain overrides.
- Enable users to override auto-clean settings - Toggle the slider to the right to allow users to override the domain policy and create their own auto-clean rules.

## Rules

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab. If you override the auto-clean rules, this section will allow you to view/create your personal auto-clean policy.

To create a new auto-clean rule, click on New Rule .

### Auto-clean by Size

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

- Folder - This dropdown will show the default email folders that every user has: Deleted Items, Junk Email and Sent Items.
- Type - This allows you to create rules based on folder Size or by Date.
- When size is great than (MB) - The size the folder needs to reach BEFORE the auto-clean rule will run.
- Reduce to (MB) - The size the folder will be reduced to once the auto-clean rule finishes.

### Auto-clean by Date

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

- Folder - This dropdown will show the default email folders that every user has: Deleted Items, Junk Email and Sent Items.

- Type - This allows you to create rules based on folder Size or by Date.
- Days - The number of days old an email can be before it is automatically deleted from the folder.

## Shared Resources

This settings page is only available to Domain Administrators.

In the Shared Resources section, Domain Administrators can create shared calendars for users of a specific domain. For example, a calendar can be created and shared to all users for tracking a department's vacation schedule or company holidays. Administrators can also use this section to create conference rooms, allowing better organization for users when scheduling appointments.

To view the Shared Resources for a domain, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Shared Resources in the navigation pane.

To create a shared resource for users on your domain, click New . The following options will be available:

### Details

On the Details tab, you'll choose the type of resource to share: Calendar or Conference Room.

- Name - The name of the resource. Note: If this resource will be 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 - Toggle the slider to the right to designate the resource as 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.

### Permissions

On the Permissions tab, you'll enter the users who should receive access to the resource and what type of access they should have.

- User - Enter only the username of the account. (For example, for user account, "jdoe@example.com", you would enter "jdoe".)

- User Group - User Groups can be created to give permissions to specific subsets of users on the domain. By default, two groups are always available: Everyone and Admins. For more information on creating additional user groups, please visit the User Groups page.
- Access - Select the type of access for the user or user group:
  - None - This option can act as a negator for permission settings. For example, if you provide access to the Admin user group, you can omit one or multiple of those Admins by entering their name in the User field and selecting None for their access.
  - Read-Only - This option allows users to see the shared data but they do not have the ability to edit the item.
  - Full Control - This option allows users to fully edit the shared data.

## 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 domain signature settings, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Signatures in the navigation pane.

## Signatures

To create a new signature, click on New . To edit an existing signature, click on its Signatures card.

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 Custom Variables dropdown in the text box's toolbar, which looks like a settings cog. (If the cog icon doesn't appear in the toolbar, you may need to click the + sign to "Show More" tools.)

## Mappings

Use this card to assign a domain-wide signature for all users on your domain and any email or domain aliases that have been configured. To allow users to create and use their own signatures, toggle the slider to the right to Enable users to override . Note: If this setting is disabled, users must use the domain-wide signature. To assign a signature to your domain, select the signature from the dropdown menu and enable the mapping by moving the slider to the right.

## ActiveSync Mailboxes

This feature is only available to Administrators using 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 (and tasks and notes, on supported devices) with a number of email clients, such as Microsoft Outlook 2013 and 2016 for Windows, as well as with smartphones, tablets and "phablets" from Apple, HTC, Samsung and others.

System Administrators who have licensed or are trialing the ActiveSync add-on will use this section to enable and disable the EAS mailboxes across all domains on the SmarterMail server. In addition, they can review the mailboxes assignments for all users on their server or quick determine how many mailboxes are in use per domain. Note: Immediately after purchasing the ActiveSync add-on, the SmarterMail installation must be reactivated in order to refresh the license limits and activate EAS. Reactivating SmarterMail can be done by clicking on Licensing in the navigation pane.

To assign ActiveSync functionality to users on your server, log into SmarterMail as a System Administrator and click on ActiveSync Mailboxes in the navigation pane. To assign ActiveSync functionality to a user account, click New . Then select the user's domain from the dropdown list and enter the complete email address of the user.

## Domain ActiveSync Management

To allow Domain Administrators to assign EAS functionality to users on their own domain, you must edit their domain configuration in the Manage section and enable ActiveSync User Management. Then specify the number of EAS mailboxes allotted for their domain.

## Message Archive Search

Setting up Archiving for All Domains only, and not including per-domain rules, limits the ability to search the Archive to system administrators only. Message Archiving is only available in SmarterMail Enterprise.

Message archiving is a method of storing all email and live chat 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 Message Archiving rule specifically for example.com needs to be set by the system admin.

System administrators can perform a message archive search by going to the Settings area and clicking on the Manage icon, then selecting Message Archive Search . System administrators can search for a message by domain, date range, the sender's address, the recipient's address, or the subject.

When message archiving is set up for a specific domain, that domain's administrator can find a Message Archive Search option by clicking on the Settings icon . Domain 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](#) .

## Domain Spam Filtering

This settings page is only available to Domain Administrators.
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SmarterMail includes a variety of antispam measures that will help keep a user's inbox free of unwanted mail. In the Spam Filtering section, Domain Administrators can review/configure the spam filtering options and trusted senders for users on their domain. To access the spam filtering configuration, log into SmarterMail as a Domain Administrator and use the Menu icon to navigate to the Domain Settings section. Then click on Spam Filtering in the navigation pane.

Jump To:

- [Spam Filtering Options](#) - Configure the filtering options for spam messages on your domain
- [Trusted Senders](#) - Exempt specific email addresses and domains from spam filtering

### Spam Filtering Options

In most cases, a System Administrator has already configured the filtering options for spam messages on your domain. However, if they allow it, Domain Administrators can override those settings to select their own options for filtering out potentially unwanted email.

## Options

- Override spam settings for this account - Toggle the slider to the right to customize the spam filtering and weights for your domain. If this option is disabled, the systems's default spam filtering policy will be displayed.

## 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.

## Trusted Senders

Domain Administrators can add specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. This can prevent mail from friends, business associates and mailing lists from being blocked and lets the system know that these messages come from a trusted source. Note: Email addresses in a user's contacts are always considered trusted senders. In addition, if users unmark a message as spam, the sender is automatically included on their personal trusted senders list.

When adding trusted senders, enter only one email address or domain per line break.

## Domain Content Filtering

This settings page is only available to Domain Administrators.
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Content Filtering at the domain level is a great way to perform actions that meet specific criteria for all users on the domain . 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 for users the way you want to.

Note: The evaluation of domain content filters happens before the evaluation of account-specific content filters.

To access the content filtering settings for the domain, log into SmarterMail as a Domain Administrator and click on the Settings icon . Then click on Content Filtering .

To add a new content filter, click New . The following options will be available:

## General

- Name - The friendly name chosen to describe the rule.
- Order - Content filters are executed in the order in which they appear. In addition, when a content filter gets triggered and performs an action on a message, no other content filtering is performed on that message. In this field, enter the position number for your filter. If a filter already exists in the position number that was entered, the filter currently being edited will override that position and existing filters will adjust accordingly.
- Match Type - Because multiple conditions can be configured per content filter, SmarterMail provides the option to require ALL conditions to be met or only ONE of the conditions to be met in order for the rule's action to be triggered. Select the appropriate option from this list.
- Enable wildcards in search strings (\* and ?) - Toggle the slider to the right to enable wildcard functionality. Wildcards can be used to replace a specific word, phrase or character, where a question mark (?) represents a single character and an asterisk (\*) represents any text. For example, if you wanted to block sales01@domain.com, sales02@domain.com and sales03@domain.com, you could enter sales??@domain.com . If you wanted to block all sales addresses, you could enter sales\* instead.

## Conditions

Click on New Condition to specify the criteria that triggers the rule's action(s). For each condition selected, you will be able to add specifications and enter any necessary details, as required. For example, if you choose to filter on 'From Address', you can enter one or multiple email addresses. If you choose to filter on 'Contains specific words or phrases', you can enter the specific text and choose to look for that text in an email's subject, message body, header, etc.

On many conditions, you also have the ability to reverse the logic of the criteria item by changing the Comparison selection. For example, imagine you only want to accept email from specific domains. You would choose the 'From specific domains' condition and set the Comparison field to 'Does Not Match'. Any messages sent from domains that do not match what you've entered in the text box can be deleted.

Note: If you select a condition that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following conditions are available, separated by Condition Type:

### 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

- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated
- Message over size
- Message under size
- Received in date range
- Sent through a specific server (by IP address)
- Spam probability

## Actions

Click on New Action to specify what should occur when an email triggers the content filter condition(s). Note: If you select an action that requires a value to be entered, and the field is left blank, SmarterMail will ignore this rule.

The following actions are available:

- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: Messages deleted through content filtering cannot be recovered.
- Reroute message - Forwards the message to another email address. Unlike 'Copy message', this option will not store a copy of the email in your own account.
- 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 dropdown list. Note: If you later delete that folder and leave the content filter active, the filter will automatically create the folder when the action is triggered.
- Add Header - Adds an email header within the incoming message, which can be useful when performing additional filtering through Outlook or another email clients. Headers should be formatted like "X-someheadername: value"
- Prefix subject - Appends 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 text box.
- Copy message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- 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.
- Set Priority - Automatically elevates 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.
- Flag message - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.

## 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".

## Chat Clients and Encryption

Many XMPP chat clients out these days encrypt the chats that happen between 2 or more users. Unfortunately, this encrypted chat traffic occurs between the client and SmarterMail itself. (Or fortunately, depending on where you fall on the topic of personal encryption.) Therefore, while SmarterMail will see chats occur, it doesn't have the ability to capture and archive the unencrypted text. Therefore, some results returned when you do a Chat History search will appear garbled or show generic text, like this from the XMPP client Gajim:

[This is part of an encrypted session. If you see this message, something went wrong.] ([This is part of an encrypted session. If you see this message, something went wrong.])

## [Help for System Administrators](#)

### Logging in to SmarterMail

To access the login page, SmarterMail system administrations will need to navigate their Web browser to the location of the SmarterMail installation. By default, this URL is `http://127.0.0.1:9998` (if running the browser on the server itself, otherwise use the IP address of the server instead of `127.0.0.1`), but it may be different if you have changed the location of SmarterMail.

To login to SmarterMail, type in the system administrator username and password in the appropriate fields and click Login . Note: By default, the username and password are both "admin" (without the quotes). If everything matches up, you will be presented with the Domains page.

To stay logged in to SmarterMail even after closing the browser, be sure to toggle the Remember Me switch on. 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.

### Impersonate User

There are times when a System Administrator will need to access domain or user specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to login automatically as a Domain Administrator or a user. This can be a useful method to examine settings or diagnose a problem directly.

To impersonate a user or Domain Administrator, log into SmarterMail as a System Administrator and click on the Impersonate button on the right side of the page. A modal window will display asking for the email address that you would like to impersonate. Clicking Impersonate will open a new tab in which you will be impersonating the user or Domain Admin. From there, you may edit user/domain settings, content filters, or whatever other part of the account that needs to be changed or reviewed. Closing the tab will end the impersonation.

Alternatively, you can impersonate a Domain Administrator in order to manage a domain directly by clicking on the Manage in the navigation pane. Then click on a domain to open its configuration settings and click on the Manage button. When managing a domain / impersonating a Domain Administrator, an Impersonate button will also be available within a User's configuration settings.

Note: Only the primary System Administrator has impersonation privileges by default. If you are logged in as a secondary System Administrator and do not see the Impersonate button on the right side of the screen or the Manage button when viewing a domain, then impersonation privileges have not

been enabled for your account. Please contact your primary System Administrator to request to have "Allow impersonation and domain management" enabled for your account.

## Manage

### Domains

System Administrators can use the Domains section to manage the configuration of all domains in SmarterMail, impersonate domains to troubleshoot issues, send messages to users on the server, restore users' accounts and more.

To access this section, log into SmarterMail as the System Administrator and click on Manage in the navigation pane. Existing domains will load and display basic details about their setup, including the number of users, aliases and mailboxes configured and the disk space used by the domain. Within the Domains section, System Administrators can access the following items:

Jump To:

- Domain Configuration - Create new domains or modify an existing configuration
- Domain Defaults and Propagation - Adjust default settings for new domains and push changes to all domains
- User Defaults and Propagation - Adjust default settings for new users and push changes to existing users
- Domain Impersonation - Mimic the login of a Domain Administrator to inspect the domain
- Restore a User - Recover a user's account, folder or emails
- Mass Messaging - Send an email or reminder to users on the server
- Export All CSV - Export list of all domains to CSV

### Domain Configuration

To create a new domain, click the New button within the Domains section. The following custom configuration options will be available:

- Name - The name of the domain. For example, smartermail.com or example.com. To send or receive mail, the domain name must match the domain name registered with the DNS server.
- Hostname - The URL of the mail server (e.g., mail.domain.com) to be returned for an Autodiscover query by a user of that domain. Instructions on how to Set up Autodiscover for SmarterMail can be found in the SmarterTools Knowledge Base . Note: On the Domain Defaults template, the Hostname field has a default value of "mail.%domain%". This variable allows the Hostname to match the name of the domain, though this setting can be adjusted manually, if desired. This Domain Default setting will be applied to new domains and can also

be propagated to existing domains on the server.

- Folder - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved. Note: If the directory does not already exist, it will be created. This directory should be solely dedicated to SmarterMail. By default, SmarterMail saves domain information to c:\SmarterMail\Domains\.
- Domain Administrator Username - The primary Domain Administrator is responsible for adding and deleting email accounts and setting specific configurations for the domain. Domain Administrator accounts also have the ability to send and receive email, manage contacts, etc., just like a user account. Enter the identifier the Domain Administrator will use to log into SmarterMail. Enter only the username, not the full address. For example, the "jdoe" portion of "jdoe@example.com".
- Domain Administrator Password - Enter the password associated to the Domain Administrator username.

When the initial domain settings are saved, the following configuration options will appear in the window. Note: The default configuration of these remaining settings are dependent on what's configured in the Domain Defaults template but can be adjusted manually per domain, if necessary. To adjust the default configuration of new domains, modify the Domain Defaults template.

### **Options**

- Domain Name - The name of the domain. For example, smartermail.com or example.com. To change the name of a domain in SmarterMail, use the Actions (...) button to click on Rename Domain .
- Domain Status - The current status of the domain: Enabled or Disabled. Disabled domains cannot send email and users cannot login to the Web interface. However, the domain will still receive email to prevent email loss. This option is a good way to temporarily shut off a domain without deleting it.
- Folder - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved. To modify the domain's folder path, use the Actions (...) button to click on Change Domain Path .
- Change Domain Admin - To adjust the primary Domain Administrator for the domain, click on the dropdown. Choose an existing user on the domain or click on New User to create a new account.
- Outgoing Gateway - Outgoing gateways can reduce the load on the server by using a secondary server to process outgoing mail. Specify an outgoing gateway to use for messages sent from this domain. If no options are available, an outgoing gateway has not been configured. Instructions on how to Configure SmarterMail as a Free Gateway Server can be found in the SmarterTools Knowledge Base .

## **Limits**

- **Disk Space (MB)** - The maximum number of megabytes allocated for the domain. By default, the domain is allocated 500 MB of disk space. This disk space limit also includes file storage and meeting workspaces for users. Note: When this limit is reached, SmarterMail will send a warning to the domain administrator and mailboxes on the domain will not be able to receive new mail.
- **Domain Aliases** - The maximum number of domain aliases allowed for the domain. A domain alias is basically an alternate domain name for one that already exists in SmarterMail. For example, imagine you have a domain, 'example.com', in SmarterMail with a user, 'user@example.com'. 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. By default, domains are limited to two domain aliases.
- **Users** - The maximum number of mailboxes allowed for the domain. By default, domains are limited to 100 users. Note: If your SmarterMail license limits the number of mailboxes allowed on the domain, your license level will override this setting.
- **User Aliases** - The maximum number of alias email accounts allowed for the domain. An email alias is essentially a forwarding email address that can be used to forward messages to a single address or multiple email addresses. By default, domains are limited to 1,000 user aliases.
  
- **Max Message Size** - The maximum size email a user can send. By default, the max message size is 10,000 KB. This number includes text, HTML, images and attachments. Note: Base64 encoding of attachments increases the size of attachments by approximately 50%. This can impact the overall size of the message and can lead to confusion on the part of senders. For example, if Max Message Size is set to 12MB and a sender adds a 9MB attachment to a message it will essentially be 13MB due to the Base64 encoding. This means that the 9MB attachment will still exceed the message size limit due to this increase.
- **Recipients per Message** - The maximum number of recipients a message can have. By default, users can send messages to 200 email addresses.

## **ActiveSync**

Microsoft Exchange ActiveSync (EAS) is the industry standard for synchronizing email clients and mobile devices with email servers like SmarterMail. Using EAS, users can synchronize email, contacts and calendars (and tasks and notes, on supported devices) with email clients, like Microsoft Outlook 2013 and 2016 for Windows, and with smartphones, tablets and "phablets" from Apple, HTC,

Samsung and others. When trialing the add-on or using a paid subscription, the following options will be available:

- ActiveSync Accounts - The maximum number of Microsoft Exchange ActiveSync accounts that can be assigned for the domain. Note: This setting is used in conjunction with the ActiveSync User Management setting.
- ActiveSync Remote Wipe - Enable this option to allow users with the Exchange ActiveSync add-on to have access to SmarterMail's remote wipe functionality.
- ActiveSync User Management - Enable this option to allow Domain Administrators to assign their allotted Exchange ActiveSync mailboxes to users on their domain. Note: This option is used in conjunction with the ActiveSync Accounts setting.

## **Email**

- Autoresponder Exclusions - To prevent SmarterMail from sending automated messages, such as out-of-office replies, to addresses based on the spam level of the original message, select the appropriate option from the list.
- Forwarding Exclusions - To prevent the system from forwarding messages based on the spam level of the message, select the appropriate option from the list.
- Inbound Message Delivery - Administrators can specify the domain location for incoming email delivery. This allows you to specify whether the domain is hosted locally or partially/entirely on an external server. The following options are available:
  - Local - Select this option if the mail server is hosted locally.
  - External (use MX record) - Select this option if the mail server is hosted partially or entirely externally. Messages will be delivered based on an MX lookup. Select the option "Deliver locally if user exists" to perform a local delivery instead of external if the user exists locally.
  - External (use host address) - Select this option if the mail server is hosted partially or entirely externally. Messages will be delivered to the specified host address. The host address can either be entered as an IP address or the Fully Qualified Domain Name (FQDN), such as mail.yourdomain.com. Select the option "Deliver locally if user exists" to perform a local delivery instead of external if the user exists locally.
- Users can override spam settings - Enable this setting to allow users to override the spam filtering options for their account.
- Bypass greylisting - Greylisting is a spam prevention method that temporarily rejects any email from an unrecognized sender. Though effective, greylisting can lead to a delay in email delivery for a domain. Enable this option to disable the greylisting antispam check for the domain.

## **Mailing Lists**

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 or unsubscribe from email communications.

- Mailing Lists - Enable this option to allow Domain Administrators to create and use mailing lists to send mass emails.
- Mailing List Command Address - The email address for which listserv commands are emailed for the domain. By default, SmarterMail sets this as listserv.
- Mailing Lists - The maximum number of mailing lists allowed for the domain. By default, this setting is set to Unlimited.
- Mailing List Max Message Size (KB) - The maximum size message that can be sent to a mailing list. By default, the maximum message size is set to Unlimited.

## **Security**

- Outbound IPv4 - The IPv4 address used to connect to external SMTP servers when a message is sent by the domain. If multiple IPv4 IPs are on the server, they will be listed in the dropdown.
- Outbound IPv6 - The IPv6 address used to connect to external SMTP servers when a message is sent by the domain. If multiple IPv6 IPs are on the server, they will be listed in the dropdown. Note: This setting will only be visible if IPv6 has been enabled within the SMTP Out Protocols settings .
- TLS - To enable or disable TLS (SSL encryption) for outgoing mail, select the appropriate option from the list.
- SRS - To enable or disable SRS (the ability for the mail server to re-write the senders email address so that forwarded messages pass SPF checks) for mail, select the appropriate option from the list.
- Require SMTP Authentication - Enable this option to require SMTP authentication when sending email. Note: If this option is enabled, users must provide an email address and password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.
- Force all traffic over HTTPS - Select this option to force all SmarterTrack traffic over HTTPS. This improves SmarterMail security by allowing all traffic to be encrypted. Note: Prior to enabling this setting, SmarterMail must be set up as a site in IIS and have a valid SSL certificate in place for the SmarterMail site. If this is enabled and a user navigates to the IP address, the server will attempt a rDNS lookup and then redirect accordingly.

## **Miscellaneous**

- **Logout URL** - By default, when users log out, they are presented with the screen to log back into SmarterMail's Web interface. This setting allows for a separate URL that the user is redirected to upon logout. To enable a logout URL for the domain, enter the full URL and toggle the slider to the right. Note: Domain Administrators cannot override the logout URL for their domain unless this functionality is enabled in the General Settings section.
- **Calendar Auto Clean Months** - Use this to set a time frame that SmarterMail will use to automatically remove legacy calendar items from users' calendars. This setting can also be managed by Domain Administrators.
- **Allow domain admins to create domain aliases** - Enable this option to allow Domain Administrators to create domain aliases. A domain alias is basically an alternate domain name for one that already exists in SmarterMail. For example, imagine you have a domain, 'example.com', in SmarterMail with a user, 'user@example.com'. 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.
- **Allow users to opt out of LDAP listings** - Select this option to allow users to remove themselves from the Global Address List. Note: This feature is only available when licensed with SmarterMail Enterprise.
- **Exclude IP from received line** - Select this option to remove the client's IP address from the received header on messages received through SMTP. Note: Removing the IP address from the received header is not recommended because it violates RFC.
- **Restrict autoresponders to once per day per sender** - Select this option to limit how frequently an autoresponder is sent. Continually sending something like an out-of-office reply to the same address every time an email comes in can cause abuse issues. Therefore, it is recommended that this be set for all domains.
- **Use primary domain admin as postmaster address if there is no postmaster account** - Select this option to use the primary domain administrator as postmaster address if there is no postmaster account configured for the domain. Note: The postmaster address for the server can be configured in the General Settings section.

## **Priority and Throttling**

Use this card to prioritize the remote delivery of standard messages and configure the throttling options for the domain. By default, all messages for all users are sent at a normal priority with an exception of mailing lists, which default to low priority. Messages that fail the first attempt to deliver get automatically "degraded" in priority to low.

Throttling, on the other hand, allows system administrators to limit the number of messages per hour and/or the amount of bandwidth used per hour to send messages. If the throttling action is set to Reject, SmarterMail will bounce any messages attempting to be sent after the threshold is met, until the next session. If the throttling action is set to Delay, SmarterMail will allow the message into the spool and trickle delivery.

- Standard Message Priority - The priority level for messages that don't have another priority affecting it.
- Outgoing Messages per Hour - The number of messages sent by the domain per hour. By default, the number of outgoing messages is 5,000.
- Message Throttling Action - The action SmarterMail should take when the message throttling threshold is reached.
- Outgoing Bandwidth per Hour (MB) - The total number of MBs sent by the domain per hour. By default, the outgoing bandwidth is 100.
- Bandwidth Throttling Action - The action SmarterMail should take when the bandwidth throttling threshold is reached.
- Bounces Received per Hour - As bounce messages are received from null senders per RFCs, this setting dictates the number of messages from null senders a domain can receive over SMTP before any further messages from null senders will be rejected. By default, a domain can receive 1,000 bounces per hour.
- Bounces Throttling Action - The action SmarterMail should take when the bounces throttling threshold is reached.

## **Features**

- Active Directory Integration - Select this option to enable active directory authentication. By enabling this, domain administrators will be able to add in the necessary LDAP binding string to import LDAP users. Note: This feature is only available when licensed with SmarterMail Enterprise.
- Catch-All Alias - Select this option to allow Domain Administrators to create catch-all email addresses. A catch-all alias is an email address that receives all incoming email that goes to invalid email addresses within the domain.
- Chat (XMPP) - Select this option to allow users on the domain to chat with each other via the Web interface or any XMPP-compatible chat client. Note: This feature is only available when licensed with SmarterMail Enterprise.
- Connected Services - Select this option to allow users to connect different services to their SmarterMail accounts to facilitate actions like attaching links to shared files.
- Disposable Addresses - Select this option to allow users to create a temporary, disposable

address independent of their email address.

- Domain Chat History View - Select this option to allow domain administrators to be able to search through all chat history for any and all users of a domain.
- Exchange Web Services (EWS) - Select this option to enable users on the domain to synchronize SmarterMail with supported email clients using Exchange Web Services (EWS). For domains that will support inboxes with large volumes of email, IMAP is encouraged as the primary protocol as EWS does not perform well with large amounts of email. Note: This feature is only available when licensed with SmarterMail Enterprise.
- File Storage - Select this option to allow users to access the File Storage section, where users can upload files to the mail server and then share them by sending out links to those files.
- Global Address List - Select this option to provide a listing of all users who have accounts for the particular domain in the Contacts menu icon. If the Global Address List is disabled for a domain, collaboration items, like calendars or notes, will not use autocomplete when adding shared users. Note: This feature is only available when licensed with SmarterMail Enterprise.
- Login Display Customization - Select this option to allow domain administrators to customize the login screen to add a company logo, provide additional branding text, or adjust the default Login to SmarterMail text.
- Team Workspaces - Select this option to allow users to create Team Workspaces, which allow for video chatting, shared documents and a collaborative whiteboard with users on the domain and guests alike.
- SMTP Accounts - Select this option to allow users to send email from a third-party mail server account right from within SmarterMail. When enabled, this setting can be managed by domain administrators as well.

### **Autodiscover**

Autodiscover is a service that allows email clients to automatically determine a user's mail server address and port from that user's email address and password alone. This greatly simplifies a user's setup process when attempting to connect SmarterMail to a desktop client, like Outlook and Windows Mail, as well as mobile clients on their iPhone, iPad, Android, Windows Phone and other mobile devices. Autodiscover settings can be configured per protocol and per domain. Instructions on how to Set up Autodiscover for SmarterMail can be found in the SmarterTools Knowledge Base .

With the appropriate DNS records and IIS configuration in place, you can use this section to enable or disable specific protocols from returning Autodiscover results. When a protocol is enabled for Autodiscover, clicking on that protocol's settings cog will open a window where the encryption type and port can be adjusted. Utilizing Autodiscover with Exchange Web Services or Exchange ActiveSync requires encryption over SSL or TLS. Therefore, port 443 MUST be available and not blocked by a firewall. NOTE: If a user has POP disabled for their account, their POP Autodiscover

request will not be fulfilled, even if POP is enabled for Autodiscover. This applies to all protocols in their account's Service Access settings.

### Modifying the Default XML Response

Administrators with advanced Autodiscover knowledge can override the default XML response that is sent from the domain when Autodiscover is requested. However, please understand that these settings should NOT be modified without advanced knowledge of the XML responses used with Autodiscover. Adjusting the custom XML incorrectly can result in invalid responses returned meaning users will be unable to connect to their email client(s). Furthermore, if you turn on an override but never save any custom XML, SmarterMail will use the default protocol settings. However, if the override is turned on, ANY text you save to the Custom XML area will be used for the Autodiscover response. If you save custom text, then later remove that text and save a blank entry, Autodiscover will send a blank response. Therefore, it is imperative that you only enable the override and enter custom Autodiscover XML if you are absolutely sure what you're using is correct.

There are two types of Autodiscover responses that can be modified: Mobile XML and Desktop XML. The mobile XML response is strictly used with Exchange ActiveSync. The desktop XML response is used with everything else, including IMAP, POP, SMTP In and Exchange Web Services. In the textbox window that appears after overriding the custom XML, clicking on Generate will show the XML response that SmarterMail would normally send on an Autodiscover request. You can generate this response to make adjustments as needed, or simply enter the XML response you would like to use. When adjusting the XML, don't remove or modify the variables, such as %EmailAddress% or %DisplayName%, since these are used to identify the user making the Autodiscover request.

## Domain Defaults and Propagation

The Domain Defaults template contains the global default configuration (of the settings listed above) that will be applied to new domains created through the Web interface or via SmarterMail's extensive Web Services. These default settings can be overwritten manually and are only intended to avoid needless data entry. It is also important to note that modifications to these settings alone will not affect existing domains.

To access the Domain Defaults template, click on the Actions (...) button in the Domains section and then click Domain Defaults . To apply some or all of the default settings to all of the domains on your server, click on the Propagation button, select the appropriate settings and click Propagate .

## User Defaults and Propagation

The User Defaults template contains the global default configuration that will be applied to new users created through the Web interface or via SmarterMail's extensive Web Services. These default settings

can be overwritten manually and are only intended to avoid needless data entry. It is also important to note that modifications to these settings alone will not affect existing users.

To access the User Defaults template, click on the Actions (...) button in the Domains section and then click User Defaults . To apply some or all of the default settings to the users on all or specific domains, click on the Propagation button, select the settings to apply and click Propagate . For descriptions of the settings found in this template, refer to the Users page.

## Domain Impersonation

There are times when System Administrators will need to access domain or user specific information in order to troubleshoot SmarterMail behavior. Impersonation is used to accomplish this goal by causing a separate window to login automatically as a Domain Administrator. This can be a useful method to examine domain configuration or adjust settings.

To impersonate a domain, click on a domain to open its configuration options. Then click on the Manage button. Alternatively, you can click on the Impersonate button on the right-hand side of the interface to enter the full email address of the Domain Administrator for the domain you would like to inspect. When managing a domain, a new window/tab will pop up, and you will be logged in as the Domain Administrator. From there, you may edit user accounts, impersonate users, adjust content filters, review the domain, etc.

## Restore

System Administrators can restore a user's emails, email folders or their entire user account, which is extremely useful if a folder or email is mistakenly deleted or if there is corruption within the mailbox.

To restore user data, click on the Actions (...) button in the Domains section. Then choose the type of restore you would like to perform:

- **Attach User** - Select this option to attach a user that is on disk but not in the domain. In other words, to restore an entire user's account. Note: The user's folder needs to be correctly placed in the domain folder on the server prior to performing this action.
- **Attach Folder** - Select this option to attach a folder that is on disk but not in the account. In other words, to restore a user's email folder.
- **Rebuild Folder** - Select this option to copy .grp files or .eml files into an existing user's folder and have SmarterMail re-build that folder to include the new .grp and .eml files. In other words, to restore a user's emails.

The following options will be available, depending on the restore type selected.

- Email Address - The full email address of the user account being restored.
- Folder Path - The path of the folder within the Web interface that will be used to rebuild or restore an email folder. For example, if you're restoring a subfolder that was created under the Inbox, the folder path would look like: Inbox\Example Folder.
- Recursive - Enable this option to attach any subfolders that are found within a folder that is being attached or rebuilt.

Note: There could be a UID conflict issue if you restore .grp files into an existing folder with existing .grp files. If you are only restoring email messages, it is recommended that you create a new folder within the SmarterMail interface and copy the .grp and/or .eml files to that new folder. Then use the Rebuild Folder function. This issue would not occur when restoring .eml files into an existing folder with existing email.

## Mass Messaging

SmarterMail gives System Administrators the opportunity to send mass emails and reminders to selected groups of users. This can be extremely beneficial for notifying users of a specific domain about any policy changes, announcing work being done that may impact their access to the mail server, sending warnings to specific users about any potential mail server abuse, sending emails to all domain administrators regarding settings changes and much more. It's a simple way for system admins to keep mail server users up-to-date and current about a variety of topics.

### Send Email

To send a mass email, click the Actions (...) button in the Domains section and then click Send Email . The mass messaging options will load in a modal window and the following fields should be completed:

- From - The individual sending the email message. "System Administrator" will be entered as a default.
- To - Select the message recipients from the list. Note: If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.
- To Friendly Name - This is a friendly name or description for the recipients that will appear in conjunction with their email address in the To field. For example, if you're sending an email to all users of the domain example.com you could use something like "Example.com User".
- Subject - The subject of the email.
- Message - Type the text of the message in this field. Messages can be in plain text or stylized with HTML formatting.

Once you complete all the fields, click the Send to deliver the message.

### **Send Reminder**

Reminders are a quick and easy way to send a follow-up to a previous, more detailed and stylized mass message. For example, if you send a message to all users of a domain about some upcoming maintenance work on the mail server, you can use Send Reminder to do a quick follow up reminding the users of the scheduled work.

To send a mass reminder, click on the Actions (...) button in the Domains section and then click on Send Reminder . The mass messaging options will load in a modal window and the following fields should be completed:

- To - Select the message recipients from the list. Note: If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.
- Subject - The subject of the email.
- Message - Type the text of the message in this field.

Once you complete all the fields, click the Send to deliver the message.

### **Export Domains List to CSV**

System Administrators can export a list of all domains on the server in CSV format. The CSV spreadsheet will include every domain name and its current state: Active or Inactive (also known as: Running or Disabled).

To export a list of domains on the server, click on the Actions (...) button in the Domains sections and then click on Export All CSV .

## **Spool**

### **Spool Overview**

The email spool is a list of emails, in order of when they are created, that are available for the server to send out to other mail servers or to deliver locally. Within the Spool Overview section, administrators can monitor a dashboard of common aspects of the email spool, including message activity, top outbound senders, top inbound domains and more. In addition to reviewing the spool activity, administrators can take action on any messages that are currently being held in the spool. For example, a sending IP address that is inundating the mail server with unwanted messages can be blocked, thereby preventing issues from becoming problems for email users.

And while monitoring the spool regularly is good practice, the Overview section is extremely helpful should the mail server become compromised! Easily spot a compromised account, block the sender and delete the unnecessary messages. The overview dashboard provides a real-time look at a mail server's activity, refreshing every 20 seconds, so admins always know what's going on.

To access the Spool Overview, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Overview tab .

Note: All tables, with the exception of Message Activity, sort entries based on the message count for the last 24 hours. For example, if an entry is the top sender/receiver within the last 5 minutes or hour, but 12th in the last 24 hours, they would not appear on the table.

## Message Activity

This section displays the total number of messages that have been delivered by all users, including local and remote deliveries. From this table, see how many messages were sent in the last 5 minutes, last hour, last 24 hours and from the start of the installation.

## Top Outbound Senders

This section displays the top 10 users with the highest number of outbound remote deliveries (for the specified time intervals). Note: The message count does not include local deliveries sent to user-to-user. The following actions can be performed on each user included in the table:

- **Change Password** - Select this option to change the password of a user's account. Changing the password is an ideal option when resolving a compromised account.
- **Drop Connections** - Select this option to end the user's connection(s) via webmail and different syncing protocols, including SMTP, IMAP, POP, XMPP and ActiveSync.
- **Disable User** - Select this option to immediately disable the user's account. This action utilizes the User Status setting found when editing a user . When a user is disabled within the Spool Overview, their User Status will be set to 'Disable and Allow Mail'. This prevents the user from sending outbound messages or accessing webmail; however, the mailbox will continue to receive incoming email. Enabling a user in the Spool Overview will adjust the setting in the user's account settings and vice versa.
- **Delete Messages** - Select this option to permanently delete the messages sent by the user that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.
- **Move Messages** - Select this option to move the messages sent by the user that are currently held in the spool to another folder on the server. Use the default path provided or enter any

folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

Note: In general, this table will display SmarterMail user accounts only. However, there may be cases where remote email addresses appear, including if: the email address is authenticated with a local account, the sending IP address is listed in the SMTP Authentication Bypass list, SmarterMail is acting as an incoming gateway, or messages were manually dropped into the spool with sender addresses that don't exist locally. In these instances, the Manage User and Disable User actions cannot be performed.

## Top Outbound IP Addresses

This section displays the top 10 IP addresses that have sent the highest number of outbound, remote deliveries (for the time intervals specified). The following actions can be performed on each IP address included in the table:

- **Blacklist IP** - Select this option to block the IP address from sending messages to the server. When an IP address is blacklisted from the spool, an entry will be added to the Blacklist found in the Security section. The IP address will be blocked on SMTP only, and the entry will be denoted as having been blocked from the spool. Unblocking an IP address in the spool will remove the Blacklist entry in Security settings and vice versa.
- **Delete Messages** - Select this option to permanently delete all outbound messages sent from the IP address that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.
- **Move Messages** - Select this option to move all the outbound messages sent from the IP address that are currently held in the spool to another folder on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Top Inbound Recipients

This section displays the top 10 users (local user accounts) who have received the highest number of incoming messages (for the time intervals specified). Both local and remote deliveries are included in the message count. This allows administrators to know which accounts on the server are receiving the most mail. The following actions can be performed on each user included in the table:

- **Change Password** - Select this option to change the password of a user's account. Changing the password is an ideal option when resolving a compromised account.
- **Drop Connections** - Select this option to end the user's connection(s) via webmail and different syncing protocols, including SMTP, IMAP, POP, XMPP and ActiveSync.

- Delete Messages - Select this option to permanently delete all of the inbound messages sent to the user that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.
- Move Messages - Select this option to move a user's inbound messages that are currently held in the spool to another folder on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Top Inbound Senders

This section displays the top 10 email addresses that have sent the highest number of messages to users on the server (for the time intervals specified). The following actions can be performed on each email address included in the table:

- Block Inbound SMTP - Select this option to block all incoming mail sent from the email address. This action utilizes SMTP Blocking found in the Security section. When an email address is blocked within the spool, an entry will be added to the SMTP Blocks list for incoming email and the entry will be denoted as having been blocked from the spool. Unblocking an email address in the spool will remove the SMTP block and vice versa.
- Delete Messages - Select this option to permanently delete all inbound messages sent from the email address that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.
- Move Messages - Select this option to move all the inbound messages sent from the email address that are currently held in the spool to another folder on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Top Inbound IP Addresses

This section displays the top 10 IP addresses that have sent the highest number of messages to users on the server (for the time intervals specified). The following actions can be performed on each IP address included in the table:

- Blacklist IP - Select this option to block the IP address from sending messages to the server. When an IP address is blacklisted within the spool, an entry will be added to the Blacklist found in the Security section. The IP address will be blocked on SMTP only, and the entry will be denoted as having been blocked from the spool. Unblocking an IP address in the spool will remove the Blacklist entry in Security settings and vice versa.
- Delete Messages - Select this option to permanently delete all inbound messages sent from the

IP address that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.

- **Move Messages** - Select this option to move all the inbound messages sent from the IP address that are currently held in the spool to another folder on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Top Inbound Domains

This section displays the top 10 domains that have sent the highest number of messages to users on the server (for the time intervals specified). The following actions can be performed on each domain included in the table:

- **Block Inbound SMTP** - Select this option to block all incoming mail sent from the domain. This action utilizes SMTP Blocking found in the Security section. When a domain is blocked within the spool, an entry will be added to the SMTP Blocks list for incoming email, and the entry will be denoted as having been blocked from the spool. Note: This action does not block on the EHLO Domain. Instead, it uses the Email Address field and enters only the domain. Unblocking a domain in the spool will remove the SMTP block and vice versa.
- **Delete Messages** - Select this option to permanently delete all inbound messages sent from the domain that are currently in the spool. Note: This will only delete messages that are CURRENTLY being held in the spool.
- **Move Messages** - Select this option to move all the inbound messages sent from the domain that are currently held in the spool to another folder on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Spool (and Waiting to Deliver)

The email spool is a list of emails, in order of when they are created, that are available for the server to send out to other mail servers or to deliver locally. SmarterMail is multi-threaded, which means that if a message cannot process out of the spool, SmarterMail simply moves on to the next message until the maximum number of threads that are designated in the administrative configurations are in use.

Administrators can use the information here to adjust threads and resources to allocate for concurrent messages.

Messages enter and leave the spool fairly quickly. In fact, some pass through so quickly that they will

not display in the spool. Most messages in the spool are displayed because they are large, have many recipients, or are having trouble being sent to their final destination.

To view all messages in the spool, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Spool tab . All incoming and outgoing messages, including ones that are attempting to be delivered or waiting to be delivered, will display on the Spool tab. To view a filtered display of the spool for only messages that are waiting to be delivered, click on the Waiting to Deliver tab .

Note: Messages that are Waiting to Deliver have typically encountered an error on one or more recipients of the message and are waiting for the next retry interval to attempt delivery again. Emails that are stuck on local delivery or waiting to deliver without any retry attempts, are typically the result of IO Bottleneck at the CPU or storage array.

The following details can be seen for each entry in the spool:

- Filename - The unique name of the EML file on the hard disk of the SmarterMail server.
- Spool Path - The spool the message resides in. If you have subspools enabled, the message may be placed in one of those locations.
- Sender - The email address that initially sent the email.
- Recipients - The number of delivered/total recipients.
- Size - The total size of the message on the hard drive, in kilobytes.
- Attempts - The number of delivery attempts that have been made.
- Time in Spool - The total amount of time the message has been in the spool.
- Priority - The priority level of the message: low, normal or high.
- Status - The current status of the message. Messages in the spool have four delivery statuses:
  - Delivery Delay - This is the first status of any message in the spool. Administrators can configure a Delivery Delay within the system's General Settings. This delay represents the number of seconds mail will be held in the spool before it is delivered. A delivery delay is beneficial when you are running a secondary service (such as a virus checker) that needs access to messages prior to delivery, as it provides ample time for the secondary service to interact with the message.
  - Spam Check - At the second stage of an email's delivery process, SmarterMail runs the configured spam checks against the contents of the email. Messages from whitelisted senders will bypass this delivery status.
  - Waiting to Deliver - Emails with a status of Waiting to Deliver have typically encountered an error on one or more recipients of the message and is waiting for the next retry interval to hit. On the next retry interval, the delivery process will start from the top with its configured Delivery Delay.

- **Remote / Local Delivery** - This is the final stage of an email's delivery, where the message is sent to its intended recipients. A status of Local Delivery will appear for messages sent between local users on the server and is shown is when SmarterMail is writing to the actual GRP files. Remote Delivery will appear for any outgoing messages that are destined for outside of the mail server.
- **Next Attempt** - The date and time of the next delivery attempt, based on the retry intervals configured in General Settings.

To view the contents of a message or its intended recipients, click on the entry's row. The email will load in a popup window. If you are presented with a note that the "Message no longer exists," it's possible that the message was already delivered or removed by antivirus software or that the spool contains an orphaned HDR file without the associated EML.

The following actions can be taken on selected entries using the Actions (...) button:

- **Force** - Pushes the selected message(s) to the top of the spool by setting its priority to High. Note: The status of forced messages will not update until the server passes through the spool.
- **Reset Retries** - Resets the retry counts on the selected message(s) in the spool, effectively starting the delivery process over. This can be useful if a DNS or firewall problem has been recently resolved, or if you are using SmartHosting and the target server was down.
- **Set Priority** - Changes the priority level of the selected message(s).
- **Delete** - Removes the selected message(s) from the spool. Note: No confirmation dialog will display, so use caution when deleting from the spool.
- **Move Messages** - Moves the location of the selected message(s) from the general email directory to a new path on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Searching the Spool

Domain administrators can search for messages from particular senders in the spool. To do so, use the Search bar at the top of the content pane. Simply type in the email address of the sender and click the magnifying glass to search for any messages from that sender that are in the spool.

## Spool (and Waiting to Deliver)

The email spool is a list of emails, in order of when they are created, that are available for the server to send out to other mail servers or to deliver locally. SmarterMail is multi-threaded, which means that if a message cannot process out of the spool, SmarterMail simply moves on to the next message until the maximum number of threads that are designated in the administrative configurations are in use.

Administrators can use the information here to adjust threads and resources to allocate for concurrent messages.

Messages enter and leave the spool fairly quickly. In fact, some pass through so quickly that they will not display in the spool. Most messages in the spool are displayed because they are large, have many recipients, or are having trouble being sent to their final destination.

To view all messages in the spool, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Spool tab . All incoming and outgoing messages, including ones that are attempting to be delivered or waiting to be delivered, will display on the Spool tab. To view a filtered display of the spool for only messages that are waiting to be delivered, click on the Waiting to Deliver tab .

Note: Messages that are Waiting to Deliver have typically encountered an error on one or more recipients of the message and are waiting for the next retry interval to attempt delivery again. Emails that are stuck on local delivery or waiting to deliver without any retry attempts, are typically the result of IO Bottleneck at the CPU or storage array.

The following details can be seen for each entry in the spool:

- Filename - The unique name of the EML file on the hard disk of the SmarterMail server.
- Spool Path - The spool the message resides in. If you have subspools enabled, the message may be placed in one of those locations.
- Sender - The email address that initially sent the email.
- Recipients - The number of delivered/total recipients.
- Size - The total size of the message on the hard drive, in kilobytes.
- Attempts - The number of delivery attempts that have been made.
- Time in Spool - The total amount of time the message has been in the spool.
- Priority - The priority level of the message: low, normal or high.
- Status - The current status of the message. Messages in the spool have four delivery statuses:
  - Delivery Delay - This is the first status of any message in the spool. Administrators can configure a Delivery Delay within the system's General Settings. This delay represents the number of seconds mail will be held in the spool before it is delivered. A delivery delay is beneficial when you are running a secondary service (such as a virus checker) that needs access to messages prior to delivery, as it provides ample time for the secondary service to interact with the message.
  - Spam Check - At the second stage of an email's delivery process, SmarterMail runs the configured spam checks against the contents of the email. Messages from whitelisted senders will bypass this delivery status.

- **Waiting to Deliver** - Emails with a status of **Waiting to Deliver** have typically encountered an error on one or more recipients of the message and is waiting for the next retry interval to hit. On the next retry interval, the delivery process will start from the top with its configured **Delivery Delay**.
- **Remote / Local Delivery** - This is the final stage of an email's delivery, where the message is sent to its intended recipients. A status of **Local Delivery** will appear for messages sent between local users on the server and is shown is when SmarterMail is writing to the actual GRP files. **Remote Delivery** will appear for any outgoing messages that are destined for outside of the mail server.
- **Next Attempt** - The date and time of the next delivery attempt, based on the retry intervals configured in **General Settings**.

To view the contents of a message or its intended recipients, click on the entry's row. The email will load in a popup window. If you are presented with a note that the "Message no longer exists," it's possible that the message was already delivered or removed by antivirus software or that the spool contains an orphaned HDR file without the associated EML.

The following actions can be taken on selected entries using the **Actions (...)** button:

- **Force** - Pushes the selected message(s) to the top of the spool by setting its priority to **High**. Note: The status of forced messages will not update until the server passes through the spool.
- **Reset Retries** - Resets the retry counts on the selected message(s) in the spool, effectively starting the delivery process over. This can be useful if a DNS or firewall problem has been recently resolved, or if you are using **SmartHosting** and the target server was down.
- **Set Priority** - Changes the priority level of the selected message(s).
- **Delete** - Removes the selected message(s) from the spool. Note: No confirmation dialog will display, so use caution when deleting from the spool.
- **Move Messages** - Moves the location of the selected message(s) from the general email directory to a new path on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

## Searching the Spool

Domain administrators can search for messages from particular senders in the spool. To do so, use the **Search bar** at the top of the content pane. Simply type in the email address of the sender and click the magnifying glass to search for any messages from that sender that are in the spool.

## Spam Quarantine

System Administrators can quarantine outgoing messages that have been flagged as spam by SmarterMail's spam checks for a maximum of 30 days. Quarantining such messages allows administrators to investigate why certain messages are blocked as spam and make appropriate adjustments, if necessary. In addition, system administrators can easily resend any outgoing messages that should not have been quarantined.

To view a list of quarantined spam messages, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Spam Quarantine tab . Messages that have been flagged and quarantined by SmarterMail's antispam measures (including the Message Sniffer or Cyren Premium Antispam add-ons, if enabled) will be listed. The following details can be seen for each entry:

- File Name - The unique name of the EML file on the hard disk of the SmarterMail server.
- Date - The date and time the message was flagged for quarantine.
- Sender - The email address that initially sent the email.
- Recipients - The number of delivered/total recipients.
- Size - The total size of the message on the hard drive, in kilobytes.
- Attempts - The number of delivery attempts that have been made.
- Time in Spool - The amount of time the message has been quarantined.
- Time of Removal - The date and time message will be automatically removed from quarantine and permanently deleted.

To view the contents of a message or its intended recipients, click on the entry's row. The email will load in a popup window.

The following actions can be taken on selected entries using the Actions (...) button:

- Resend - Moves the selected message(s) to the spool for delivery to its intended recipients.
- Delete - Remove the selected message(s) from the quarantine list.
- Move Messages - Moves the location of the selected message(s) from the general email directory to a new path on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

Note: Spam Quarantine settings can be managed from the Antispam section. To access this page, click on Antispam in the navigation pane, then click on the Options tab . The quarantine settings can be found on the SMTP Blocking card. For more information, refer to the Antispam page.

## Virus Quarantine

System Administrators can quarantine incoming and outgoing messages that have been flagged as containing viruses by SmarterMail's ClamAV or the Cyren Zero-hour Antivirus add-on for a maximum of 30 days. Quarantining such messages allows administrators to investigate false positives and make appropriate adjustments or notify the developer of the virus scanner, if necessary.

To view a list of quarantined virus messages, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Virus Quarantine tab . Messages that have been flagged and quarantined by SmarterMail's antivirus measures (including the Cyren Zero-hour Antivirus add-on, if enabled) will be listed. The following details can be seen for each entry:

- File Name - The unique name of the EML file on the hard disk of the SmarterMail server.
- Date - The date and time the message was flagged for quarantine.
- Sender - The email address that initially sent the email.
- Recipients - The number of delivered/total recipients.
- Size - The total size of the message on the hard drive, in kilobytes.
- Attempts - The number of delivery attempts that have been made.
- Time in Spool - The amount of time the message has been quarantined.
- Time of Removal - The date and time that a message will be automatically removed from quarantine and permanently deleted.

To view the contents of a message or its intended recipients, click on the entry's row. The email will load in a popup window.

The following actions can be taken on selected entries using the Actions (...) button:

- Resend - Moves the selected message(s) to the spool for delivery to its intended recipients.
- Delete - Remove the selected message(s) from the quarantine list.
- Move Messages - Moves the location of the selected message(s) from the general email directory to a new path on the server. Use the default path provided or enter any folder path on the server. Moving the .eml files to their own folder on the server is useful because it allows an administrator to review the messages before taking actions against them.

Note: Virus Quarantine settings can be managed from the Antivirus section. To access this page, click on Antivirus in the navigation pane. The quarantine settings can be found on the Options card. For more information, refer to the Antivirus page.

## Throttled Users

Bandwidth and email throttling allow System Administrators to limit the quantity of data that a SmarterMail mail server transmits within a specified period of time. This limit can be set by the amount of outgoing bandwidth used or the number of outgoing emails sent.

To view the users on the server who are currently being throttled, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Throttled Users tab .

Note: User throttling rules can be configured on the User Defaults template in the Manage > Domains section. This configuration can be further managed by Domain Administrators on a per user basis.

The following details can be seen for each entry in the list:

- User - The email address of the user account currently being throttled.
- Mailing List - This acts as an indicator to specify whether the 'user' being throttled is a mailing list address. Note: Mailing list throttling is managed by Domain Administrators on a per mailing list basis.
- Domain - The domain of the user that is currently being throttled.
- Reason - The type of action that triggered the throttle: Messages Out or Bandwidth Out.
- Date - The date and time the user triggered the throttling action.

## Throttled Domains

Bandwidth and email throttling allow System Administrators to limit the quantity of data that a SmarterMail mail server transmits and/or receives within a specified period of time. This limit can be set by bandwidth, the number of emails transmitted, and/or by the number of bounced messages received.

To view the domains on the server that are currently being throttled, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Spool button at the top of the page and click on the Throttled Domains tab .

Note: Domain throttling rules can be configured in the Manage > Domains section on the Domain Defaults template or on a per domain basis.

The following details can be seen for each entry in the list:

- Domain - The domain on the server that is currently being throttled.
- Reason - The type of action that triggered the throttle: Messages Out, Bandwidth Out or

Bounces Received.

- Date - The date and time the domain triggered the throttling action.

## User Activity

System Administrators can use this section to monitor the activity of users on the server. To access this section, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the User Activity button at the top of the page.

From this section, you can view each active user on the server and determine how many connections are occurring for each protocol, including SMTP, IMAP, POP, XMPP and ActiveSync. If a user is currently logged into webmail, their IP address and the length of their webmail connection will appear in the list as well. The following actions can be taken:

- Refresh - Refreshes the list of online users.
- Drop Connections - End the selected user's session.

There are a number of reasons why you may see 'Anonymous Users' in this list. For example, these could be people who have the login page open in a browser but are not currently logged in or there could be a monitoring app or service that is monitoring whether a login page responds to ping, etc.

## Inactive Users

Viewing Inactive Users is a good way to clean out users from the domain that are no longer needed. For example, perhaps these users and their mailboxes can be archived or copied and moved to another location in order to recover some disk space for the domain.

An "Inactive User" is an account that hasn't authenticated against the SmarterMail server in whatever period of time is selected from the Actions (...) menu. If a account is set up in an email client on desktop or mobile, if an account is set up to be pulled into another mail server or mail service, like if a user has their SmarterMail account set up in Gmail to pull messages into Gmail via IMAP or POP3, or other situations, these accounts are still "active" in that whatever action is taken in that client or service will have to authenticate against SmarterMail to perform some action. Inactive Accounts don't perform any of those actions. Therefore, they're probably unused.

In general, system administrators can view the following attributes of inactive SmarterMail users:

Note: The entries shown in this section can be sorted using the various grid column titles.

- Email Address - The email address of the user.
- Enabled - The account status of the user, indicating whether they are enabled or disabled.
- Domain Administration - An indication of whether the user has Domain Administrator

privileges.

- Last Login - The date of the last time the user logged in.

When viewing Inactive Users, it's important to first select the inactive timeframe you would like to review. This can be done by clicking on the Actions (...) button.

- 30 days - Users who have been inactive for 30 days or more. This is also the default timeframe for Inactive Users.
- 90 days - Users who have been inactive for 90 days or more.
- 6 months - Users who have been inactive for 6 months or more.
- 12 months - Users who have been inactive for 12 months or more.
- Refresh - Refreshes the list of inactive users.

Along with the inactive timeframe, the following actions can be taken within the Inactive Users section:

- Delete - Deletes the selected users from SmarterMail.
- Disable - Simply Disables the user account. This is a good way to determine whether a user is still using their account, they simply haven't logged in for some period of time. By disabling the account, if the user DOES log in, they will contact their administrator.
- Export All CSV - It's possible to download all information as a Comma Separated Values list to be used in something like Microsoft Excel, to compare against a billing system, etc.

## Current Connections

SmarterMail will monitor the server and see who is connecting via the different syncing protocols, including SMTP, IMAP, POP, XMPP and ActiveSync. System administrators can then use this section to blacklist a certain IP address or drop an IP's current connection if they believe too many connections are being made. Current connections can be viewed all at once or separated by protocol.

To view the current connections, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on the Connections button.

Regarding connections that appear to last longer than they should, this could be due to a number of reasons. For example, SMTP connections that stay active for hours could be due to multiple people connecting from behind a firewall. These people all appear to connect from a single IP, but they're actually individual connections, one for each user. The firewall simply portrays the connections as being from a single source. Another thing to note is an "anonymous" connection. An "anonymous" user is someone who has created a session without logging in. For instance, if they hit the login page and don't actually log in, that will create a new session marked as anonymous. You can get a large

number of these if a search engine attempts to index your site or if you have an uptime service monitoring your login page.

## Current IDS Blocks

System Administrators can use this section to review all IP addresses that have been blocked by the mail server as a result of any IDS (abuse detection) rules that have been configured in SmarterMail's Security area. As a result of these rules, SmarterMail will monitor the server and keep track of all IP addresses that are currently being blocked for SMTP, IMAP, POP, LDAP, XMPP, Webmail or for potential email harvesting abuse. System admins can view a list of blocked IPs by abuse type or view all blocked connections at one time.

System administrators can remove the selected IP(s) from the list by selecting the IP(s) and clicking Delete . However, this does not affect the abuse detection rule that blocked the IP in the first place; it only removes the block from the IP.

## Server Blacklist

Rather than logging into various websites and performing manual checks of their IP addresses, System Administrators can use the Server Blacklist section to check whether their mail server has been listed by one of the realtime black lists (RBL) that SmarterMail incorporates into its spam checks. These checks are performed automatically everyday for all IP addresses added to the server, regardless of whether the RBL is actively being used as a spam check. Note: Creating a Blacklist Status Changed system event is a great way to be immediately notified if a server becomes listed by an RBL.

To access the Server Blacklist, log into SmarterMail as a System Administrator and click on Manage in the navigation pane. Then click on Server Blacklist at the top of the page. You can review blacklists by IP address or by the RBL itself, and the following details can be seen for each entry, depending on the tab being viewed:

- IP Address - The IP address used for a domain, or for several domains, on that mail server.
- Spam Check - The name of the RBL or URIBL that is being checked.
- IPs Blocked - The number of IP addresses that are currently blocked by the corresponding spam check. Click on the entry's row to view the exact IP addresses.
- RBLs Blocked - The number of RBLs that are currently blocked by the corresponding IP address. Click on the entry's row to view the exact RBLs.
- Changed - The last date and time the IP showed a different block status against the specific item.
- Checked - The last date and time the IP was checked against the specific item.

# Reports

## Reports Overview

System administrators, domain administrators, and individual users can use real-time mail server statistics, historical summary reporting, and detailed trend analysis at the system, domain, and user levels to understand the performance of their systems. With dozens of pre-defined reports, SmarterMail provides critical statistics that help system and domain administrators monitor their systems.

For more information, see the Reports folder of the Help for Users section of the online help.

## System Admin Dashboard

SmarterMail includes a detailed, real-time performance dashboard that supplies system administrators with important, on-demand statistics about their server as a whole as well as information on the traffic coming into and going out of, their servers. The cards on the

The first dashboard covers System Statistics . By opening the System Statistics dashboard and then clicking the Server tab , administrators can find information on the mail service start time and the service's uptime as well as information on current CPU and memory usage. The Security tab shows information on incoming spam messages marked as Low, Medium and High, any virus statistics, information on outgoing spam as well as Greylisting statistics.

The other dashboard covers Traffic Statistics . By opening the Traffic Statistics dashboard and then clicking the Connections tab , administrators can find information on the various current connections open for a number of services, including SMTP, POP and IMAP as well as the number of delivery threads that are open. The Usage tab shows details about Protocol Activity, including the number of connections opened, the number of delivery threads and the number of messages in pool over specific periods of time. Message Activity includes information on messages delivered, local deliveries and remote deliveries over specific periods of time.

Note: Dashboard reports are only active on current data; once a service reboots, the current data showing in the report would be lost as these statistics are stored in memory only and not stored to disk.

To access the dashboards, click the reports icon . Then expand Dashboards in the navigation pane and select the desired dashboard.

## Troubleshooting

SmarterMail makes managing the mail server a breeze by isolating the monitoring and management aspects from the setup and configuration. In the Troubleshooting section, Administrators can access settings, tools and dashboards that will help them better understand what's occurring on their mail server and quickly take action while troubleshooting any issues that may arise.

To access standard troubleshooting tools, log into SmarterMail as a System Administrator and click on Troubleshooting in the navigation pane. Within this section, System Administrators can access the following items:

Jump To:

- Options - Configure the log and indexing settings for the server
- View Logs - Review the logs to look for errors or monitor recent activity
- Services - Enable or disable specific services, including IMAP, SMTP, etc.
- Mailbox Indexing - View the status of user indexing occurring on the server
- Mailbox Migration - View the mailbox migrations occurring on the server

## Options

Use this section to manage how the logs are written and to customize the indexing configuration:

### Log Files

- Log Path - The default location for the logs that email messages in SmarterMail produce. If you would like to change the default location, enter a new path here. Note that changing the log path will not take effect until you restart the SmarterMail service.
- Compress Log Files After - The number of days after which log files are automatically compressed. This preserves existing log files but also saves server space. To enable log file compressing, toggle the slider to the right.
- Delete Log Files After - The number of days after which log files are automatically deleted. To enable this automatic deletion of log files, toggle to the slider to the right.
- Debug Log IDs (one per line) - This section should only be used when instructed by SmarterTools Support. In order to better troubleshoot an issue within SmarterMail, SmarterTools Support may require additional logging. In this section, Debug Log IDs can be entered. Entering a log ID in this box will create a separate log file which will contain information Support needs for troubleshooting.

## **Protocol Logging**

By default, SmarterMail sets all log detail levels to Exceptions Only. Use this section to adjust the log detail levels for the protocols used with SmarterMail. When set to Exception Only, SmarterMail will produce small-sized logs that record only errors. When set to Normal, SmarterMail will produce medium-sized logs that record most activity taken on the mail server. When set to Detailed, SmarterMail will produce log files that can get very large and contain extensive logging. Only change logs to Detailed when asked to by SmarterTools Support or when troubleshooting server operations.

The following log file types can be adjusted:

- ActiveSync - The log level for Exchange ActiveSync connections.
- EWS - The log level for Exchange Web Services sessions.
- IMAP - The log level for IMAP sessions.
- LDAP - The log level for LDAP sessions.
- POP - The log level for POP sessions.
- SMTP - The log level for SMTP sessions.
- WebDAV - The log level for CalDav and CardDav sessions.

Note: More detailed logs require more disk space. If you choose a detailed log, you may want to enable the auto-delete setting on the Options tab.

## **Process Logging**

By default, SmarterMail sets all log detail levels to Exceptions Only. Use this section to adjust the log detail levels for common processes within SmarterMail. When set to Exception Only, SmarterMail will produce small-sized logs that record only errors. When set to Normal, SmarterMail will produce medium-sized logs that record most activity taken on the mail server. When set to Detailed, SmarterMail will produce log files that can get very large and contain extensive logging. Only change logs to Detailed when asked to by SmarterTools Support or when troubleshooting server operations.

The following log file types can be adjusted:

- Administrative - The log level for any changes and/or modifications made by system administrator accounts.
- Folder Auto-Clean - The log level for any folder auto-clean rules in place for the system or user.
- Calendars - The log level for calendar appointments.
- Delivery - The log level for message delivery and spool operations.
- Events - The log level for event sessions put in place for the system or user.
- IMAP Retrieval - The log level for IMAP retrieval sessions.

- Indexing - The log level for SmarterMail indexing.
- Mailbox Importing - The log level for data imported during mailbox migrations.
- Maintenance - The log level for maintenance tasks performed by SmarterMail.
- Message-ID - The log level for logging Message-ID's of all messages sent to mailing lists.
- POP Retrieval - The log level for POP retrieval sessions.
- API Service - The log level for web service calls using SmarterMail's API.

Note: More detailed logs require more disk space. If you choose a detailed log, you may want to enable the auto-delete setting on the Log Files tab.

## **Indexing**

Search indexing allows users to instantly find files in their mailbox, including messages, attachments, appointments, contacts, tasks, or notes. Following the initial scan of the server, SmarterMail continually monitors each user's mailbox for changes and then updates the index accordingly. This method of indexing reduces server utilization while increasing the speed with which search results are returned. Use this section to adjust the indexing configuration for your server:

- Max Threads - The maximum number of threads to use for search indexing. Increasing this value will cause SmarterMail to use more CPU, but will allow the system to simultaneously index more users. (By default, this value is set to 2 less than the server's processing count. For example, if your server has 32 processors, this value will be set to 30.) Please note that this value cannot be set to 0.
- Segment Count Before Optimizing - The number of segment counts in an index before the index is reorganized. Increasing this number will increase file counts per mailbox, but will use less CPU. (By default, this value is set to 100.)
- Items Before Garbage Collection - The number of indexed items across the server before freeing as much memory as possible. Increasing this number will increase memory usage and lower CPU usage. (By default, this value is set to 5000.)
- Items to Index Per Pass - The number of items to index per user per index attempt. Increasing this number will increase memory usage and decrease the time it takes to index one user. However, it will increase the length of time it takes to index many small users if there are a few large users. (By default, this value is set to 2500.)
- Seconds In Queue Before Indexing - The amount of time a user must be in the indexing queue before being indexed. This setting provides a buffer for many changes to a mailbox to ensure the same user is not indexed multiple times. Increasing this number will cause search results to be delayed further, but will result in indexing heavier users less frequently. (By default, this value is set to 60.)
- Deleted Items Before Optimizing - The number of items that will be removed from the index

before an optimization will occur. Increasing this number will slow search results. Decreasing this number will increase CPU and disk usage, but will increase search result speed. (By default, this value is set to 2000.)

## View Logs

Use this section to quickly view the server's log files. Viewing a server's log files, especially when it's possible to narrow down the type of server action or protocol that is being viewed, allows system administrators to look for any specific errors that could cause reliability issues on the server or narrow down reasons why a specific behavior is being seen. For example, system administrators can review SMTP logs to see if an email was delivered or check ActiveSync logs to see if they can narrow down synchronization issues between a specific user's mailbox and their mobile device.

When viewing the SmarterMail logs, the following search strings will be available:

- Start and End - The start and end dates for the log files you want to view.
- Type - The type of log file that you would like to view.
- Search - Type the words or phrases should be contained in the log files that SmarterMail returns.
- Type - When searching the logs, you can choose whether to display only lines that match the search definitions or to display related traffic as well. Change this selection from Only Matching Rows to Display Related Traffic in order to display extra data that occurred within the same session.

To search for a specific log, complete the date range, select the log type, and enter a search string. Then click Search . Any matching log files will be displayed. Note: SmarterMail will only display up to 1MB of any specific log.

To download the entire log file in a .zip format -- NOT just search results -- click on Download . This allows you to get quick access to a domain's entire log file so that it can be reviewed more thoroughly on a local machine. If you only need the search results, click on Copy to Clipboard to copy the results to your clipboard, then past those results into your favorite text editor. (We recommend Notepad ++)

## Services

Use this section to enable and/or disable specific services on the mail server. Generally, all of these services should be enabled. However, there are cases where an Administrator may want to disable one or more. For example, a web host or ISP may want to limit users' access to incoming mail to POP only when they connect with an email client in order to conserve disk space on the mail server. In this case, the system administrator would want to stop the IMAP services. Another example would be a mail administrator for a large corporation who doesn't want users to add multiple email accounts and

therefore read and reply to email from personal accounts as well as their corporate accounts. In this case, the administrator would want to disable the IMAP Retrieval and POP Retrieval services.

The following services can be enabled or disabled on the server:

- IMAP - A client/server protocol in which email is received and held by the mail server. IMAP requires continual access to the client during the time that it is working with the mail server.
- IMAP Retrieval - With IMAP retrieval, mail is retrieved from external IMAP servers (e.g., another mail server like Gmail) and saved in a mailbox on the mail server.
- Indexing - Indexes messages, contacts, calendars, tasks and notes so that users can search for specific mailbox items via the Web interface.
- LDAP (Enterprise Edition Only) - A communication protocol for accessing online directory services. Programs like Outlook and Thunderbird use LDAP to retrieve contact lists from SmarterMail. SmarterMail will validate email addresses for user accounts, aliases, and mailing lists.
- POP - An email protocol in which mail is saved in a mailbox on the mail server. When the end user reads the mail, it is immediately downloaded to the client computer and is no longer maintained on the mail server.
- POP Retrieval - Similar to IMAP Retrieval, with POP retrieval, mail is retrieved from external POP3 servers and saved in a mailbox on the mail server.
- SMTP - A TCP/IP (Internet) protocol used for sending and receiving email. However, since it's limited in its ability to queue messages at the receiving end, it's usually used with one of two other protocols, POP or IMAP, that let the user save messages in a server mailbox and download them periodically from the server. In other words, users typically use a program that uses SMTP for sending email and either POP or IMAP for receiving messages from their local server.
- Spool - The internal message queue used to deliver messages locally and to remote services.
- XMPP (Enterprise Edition Only) - An open-source IM protocol designed to allow interoperability between different IM client programs. SmarterMail uses this protocol to power its chat functionality in the Web interface and/or third-party chat clients.

To modify the status of a service, select the desired service and click Start or Stop .

## Mailbox Indexing

SmarterMail Search Indexing allows users to instantly find any files in the mailbox, including messages, attachments, appointments, contacts, tasks or notes. Following the initial scan of the server, SmarterMail continually monitors each user's mailbox for changes and updates the index accordingly. This method of indexing reduces server utilization while increasing the speed with which search results are returned.

System administrators can use this section to view the status of SmarterMail Search Indexing. Viewing the status of indexing can be beneficial when troubleshooting a problem. For example, if the mail service seems to be using a large amount of CPU, the system administrator can check to see if the cause of the temporary increase in CPU usage is due to indexing.

## Mailbox Migrations

SmarterMail's Mailbox Migration tool makes it easy for users to switch email providers by giving them the ability to import emails, contacts, calendars, tasks, and notes to SmarterMail from most third-party mail servers.

That being said, users can do this on their own, with little input from a SmarterMail System Administrator. While this normally is not an issue, there are times when an Administrator may need to stop a migration altogether. That's where the Mailbox Migrations page comes in.

The following details can be seen for each entry in the list:

- User - The name of the user performing the migration.
- Status - The status of the migration being performed. The status displayed will be one of the following:
  - Queued - The migration was initiated and is waiting to start.
  - In Progress - The migration was started and is currently processing.
  - Completed - The migration is finished for that user.

To end the selected user's migration, select the user and click on the End Session button. The migration will be stopped, regardless of where it is in process. As mailbox migrations are an "all or nothing" proposition, if a migration is stopped in the middle, none of the migration steps will be finalized unless the migration shows as "Completed."

## ActiveSync Mailboxes

This feature is only available to Administrators using 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 (and tasks and notes, on supported devices) with a number of email clients, such as Microsoft Outlook 2013 and 2016 for Windows, as well as with smartphones, tablets and "phablets" from Apple, HTC, Samsung and others.

System Administrators who have licensed or are trialing the ActiveSync add-on will use this section to enable and disable the EAS mailboxes across all domains on the SmarterMail server. In addition, they

can review the mailboxes assignments for all users on their server or quick determine how many mailboxes are in use per domain. Note: Immediately after purchasing the ActiveSync add-on, the SmarterMail installation must be reactivated in order to refresh the license limits and activate EAS. Reactivating SmarterMail can be done by clicking on Licensing in the navigation pane.

To assign ActiveSync functionality to users on your server, log into SmarterMail as a System Administrator and click on ActiveSync Mailboxes in the navigation pane. To assign ActiveSync functionality to a user account, click New . Then select the user's domain from the dropdown list and enter the complete email address of the user.

## Domain ActiveSync Management

To allow Domain Administrators to assign EAS functionality to users on their own domain, you must edit their domain configuration in the Manage section and enable ActiveSync User Management. Then specify the number of EAS mailboxes allotted for their domain.

## Administrators

SmarterMail allows a single installation to have multiple System Administrator logins, each with their own unique login and password. To add secondary System Administrator accounts, log into SmarterMail as the primary System Administrator and click on System Administrators in the navigation pane.

To create a new System Administrator account, click New . Note: Only the primary System Administrator can create or modify existing accounts. When adding or editing an account, the following settings will be available:

### Options

- Username - The identifier used to login to SmarterMail.
- New Password - The password used to login to Smartermail.
- Confirm Password - Re-type the password used to login to Smartermail.
- Display Name - A friendly name for the administrator. For example, "for support department."
  
- Allow password retrieval via API - Select this option to allow the administrator to retrieve passwords via the API.
- Allow impersonation and domain management - There are times when an administrator may need to access domain or user specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to login automatically as the domain administrator or user. Select this option to allow secondary system administrators the ability to impersonate user accounts and domains.

- Restrict login access by IP - Select this option to only allow the system administrator to login from certain IP addresses. Then enter the authorized IP address(es).

## Login Access

Use this card to specify the IP address or IP range from which system administrators can login to SmarterMail. Note: This card is only accessible if the option to enable login by IP address was selected in the Options card.

## Antispam

### Antispam | Options

SmarterMail comes equipped with a number of antispam features and functions that allow you to be as aggressive as you want when combatting spam. Default antispam settings were configured during installation, but these settings can be modified at any time. Without having to add any third-party measures, SmarterMail's antispam features can rid mail servers of up to 97% of all spam just using the standard configuration when it's installed.

Due to the flexible nature of SmarterMail's antispam setup, spam checks can influence the spam decision as much or little as you want. When spam protection runs on a particular email, all enabled spam checks are performed on the email. The total weight of all failed tests is what comprises the spam weight for the email. A spam probability level is then assigned to the email using the Filtering settings and an action is taken on that message based on its total spam weight.

An added benefit to SmarterMail's antispam administration is the ability to combat both incoming and outgoing spam messages. Most mail servers only allow Administrators to keep spam from entering the mail server. SmarterMail helps protect mail users from incoming spam but also keeps mail servers from actually sending spam, thereby helping to protect the mail servers from being blacklisted.

To view the antispam options for your server, log into SmarterMail as an Administrator and click on the Settings icon . Then click on Antispam in the navigation pane. On the Options tab, the following settings will be available:

Jump To:

- Filtering - Define the weight thresholds and default actions for each spam level.
- Trusted Senders - Exempt specific email addresses or domains from spam filtering.
- SMTP Blocking - Configure the thresholds for blocking incoming and outgoing spam messages
- Antispam Options - Adjust basic options relating to the processing of spam and the ability for

individual domains to override system-level settings.

- Greylisting Options - Temporarily reject email from unrecognized senders.
- SpamAssassin Servers - Configure a SpamAssassin server for identifying and reporting spam.
- Import/Export Settings - Import or export an XML file containing a server's antispam configuration
- Reset Antispam Settings - Reset the antispam options and spam checks to the default configuration

## Filtering

Emails are filtered into one of three categories based on their total weight: Low Probability, Medium Probability and High Probability. If a weight is equal to or higher than a certain category, then it is assigned that probability of being spam. Use this section to define the weight thresholds and the default actions at each level. Note: Users can override these settings if you permit them to in the domain's configuration options.

- Domains can override filter weights and actions - Many Domain Administrators have their own opinions on what spam checks work best for their domain. Enable this to allow them to override the spam filtering and spam check weights, if they wish.
- Weight - The email is sorted into probability levels based on the weight threshold values. Adjust the weight threshold according to the probability status selected.
- Action - The action to take when a message ends up with this level of spam probability: No Action, Delete Message, Move to Junk Email Folder or Add Text to Subject.
- Text - If the Action is set to Add Text to Subject, enter the text that will be appended to the beginning of a subject when a message reaches a particular level of spam.

## Trusted Senders

Use this section to globally exempt specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) from SmarterMail's 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: By default, every contact in a user's My Contacts list is considered a trusted sender and bypasses spam filtering.

When entering trusted senders or domains, enter only one item per line break.

## SMTP Blocking

The idea behind SMTP blocking of incoming and outgoing email is to filter out spam messages before they are delivered. For example, imagine you have four spam checks enabled for Incoming SMTP Blocking and each of those spam checks have a weight of 10. If the Incoming Weight Threshold is set

to 30, that means messages being received via SMTP will be rejected if they fail three or all four of the spam checks. This card allows you to configure the thresholds and actions taken for SMTP Blocking.

Note: Messages rejected due to SMTP blocking do not hit the spool and, therefore, will not be included in the message archive, if enabled.

- Incoming Weight Threshold - By enabling this field, an incoming email must have a total spam weight score of this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)
- Greylist Weight Threshold - By enabling this field, an incoming email must have a total spam weight score of this value or higher in order to be greylisted. The score is established by the settings on the Spam Checks tab. (Default is 30)
- Outgoing Weight Threshold - By enabling this field, an outgoing email must have a total spam weight score of this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)
- Outgoing Quarantine - The amount of time to quarantine blocked SMTP messages.

## Options

This card contains options relating to the processing of spam and the ability for individual domains to override system-level settings.

- Autoresponders - Allows you to restrict what types of automated responses are permitted for the system. Certain anti-spam organizations are starting to block those servers that auto-respond to spam traps. To reduce the possibility of this occurring, set the auto-respond option to be as restrictive as your clients will permit.
- Content Filter Bouncing - As with auto-responses, certain anti-spam organizations also blacklist those servers that send bounce messages back to spam trap accounts. SmarterTools recommends setting this option to be as restrictive as your clients will allow.
- Max message size to content scan - The maximum message size for which content-based spam checks will run. Content-based spam checks include the SpamAssassin-based Pattern Matching Engine, remote SpamAssassin, Cyren Premium Antispam, and custom rules. Note: Increasing this number will also increase the mail server's memory usage.
- Bounce messages when blocked by Outgoing SMTP Blocking - Enable this to give a user a notification when a mail message has not been sent due to its spam probability.
- Enable spool proc folder - Enable this to have SmarterMail place messages into this folder to be analyzed in the background. While the messages are in the Spool Proc folder, .hdr can manipulate elements of the message, such as edit, write, and add headers. Once the scan has been completed, the message will be placed back into the spool and handled by SmarterMail from that point on.

- Disable spam filtering on SMTP whitelisted IP addresses - Disables antispam processing and zeroes the spam weight on whitelisted IPs.
- Enable catch-all accounts to send autoresponders and bounce messages - Enable this if you rely on auto-responders being sent when a message comes in through a catch-all. In general, this is a bad idea, so it should be left unchecked unless your situation specifically requires it.
- Enable SRS when forwarding messages - Enable this to allow the mail server to re-email (as opposed to "forward") an email message so that it passes any SPF checks on the recipient's end.
- Enable DMARC policy compliance check - Enable this to allow the mail server to check messages against the DMARC policy standard. For more information, see the DMARC website

## Greylisting Options

Greylisting has proven itself to be an effective method of spam prevention. When enabled, the system will keep track of the sending IP address, sending email address and recipient's email address for every message received. If an incoming message has a combination of a sending IP, sending address and recipient address that has not previously been seen, it will return a temporary failure to the sending server, effectively saying, "Try again later." Valid servers will retry the email a short time later, which would be permitted. Spammers, on the other hand, typically create scripts that bombard your server with emails, and they rarely retry on temporary failures. When these messages are bounced back because of greylisting, they are typically not retried, therefore reducing the amount of spam that your customers receive. (Emails sent from whitelisted and authenticated senders will automatically bypass greylisting and are delivered directly to the spool.)

For those messages that are sent from valid email servers, the sending server should retry at least four times. If the first retry is beyond the block period (default 15 minutes) and within the pass period (default 6 hours), the message is passed to the spool and it goes through its normal processing without a delay. A record is also created that says this is a valid email address from that server to the given recipient and keeps it for 36 days (default). If another email from the same email address is received from the same server to the same recipient within the 36 days, the clock is reset for an additional 36 days and delivered directly to the spool.

Greylisting is a very effective method of spam blocking that comes at a minimal price in terms of performance. Most of the actual processing that needs to be done for Greylisting takes place on the sender's server. It has been shown to block upwards of 95% of incoming spam simply because so many spammers don't use a standard mail server. As such, spam servers generally only attempt a single delivery of a spam message and don't reply to the "try again later" request.

Note: The following cases are exempt from greylisting: Whitelisted IPs for SMTP or Greylisting, anyone who authenticates (includes SMTP Auth Bypass list), trusted senders (includes users'

contacts), anyone who has already sent you an email (this list generates only after greylisting has been enabled), any IP in the greylistBypass.xml file.

- Block Period - The period of time (in minutes) that mail will not be accepted (default 15 minutes).
- Pass Period - The period of time (in minutes) in which the sender's mail server has to retry sending the message (default 360 minutes).
- Record Expiration - The period of time(in days) that the sender will remain immune from greylisting once it has passed (default 36 days).
- Enable greylisting - Select this option to enable greylisting.
- Enable users to override greylisting - Select this option to allow users to selectively turn off greylisting (useful if you have an account that receives time sensitive mail).

The biggest disadvantage of Greylisting is the delay of legitimate email from servers not yet verified. This is especially apparent when a server attempts to verify a new user's identity by sending them a confirmation email. Some email servers will not attempt to re-deliver email or the re-delivery window is too short. Whitelisting can help resolve this.

## SpamAssassin Servers

SpamAssassin is a powerful, free mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam, including header and text analysis, Bayesian filtering, DNS blocklists and collaborative filtering databases. To setup a SpamAssassin server, click [New Server](#) . The following options will be available:

- Name - The name of the SpamAssassin server.
- IP Address - The IP address of the server running SpamAssassin.
- Port - The port on which the SpamAssassin server should listen. By default, the port is 783.

## Import or Export Spam Settings

SmarterMail contains all global spam settings in a single XML file and allows that XML file to be imported and exported as needed. This means Administrators can configure a solid set of antispam rules on one server, then easily move those settings over to any additional SmarterMail servers by copying over the antispam XML. Email administrators can even work together to create and share their antispam XML files files, combining their experience and understanding to create the most reliable settings available.

To import or export SmarterMail's spamConfig.xml file, click on the [Actions \(...\)](#) button. This click on [Import Spam Settings](#) or [Export Spam Settings](#) accordingly. Note that when importing spam configurations, all existing rules will be replaced with the rules in the imported XML.

## Reset Antispam Settings

To reset SmarterMail's antispam settings back to the default configuration, click on the Actions (...) button. Then click on Reset Antispam Settings . Confirm that you would like to erase any customized antispam options by clicking Reset .

## Antispam | Spam Checks, RBL and URIBL Lists

SmarterMail comes equipped with a number of antispam features and functions that allow you to be as aggressive as you want when combatting spam. Default antispam settings were configured during installation, but these settings can be modified at any time. Without having to add any third-party measures, SmarterMail's antispam features can rid mail servers of up to 97% of all spam just using the standard configuration when it's installed.

Due to the flexible nature of SmarterMail's antispam setup, spam checks can influence the spam decision as much or little as you want. When spam protection runs on a particular email, all enabled spam checks are performed on the email. The total weight of all failed tests is what comprises the spam weight for the email. A spam probability level is then assigned to the email using the settings in the Filtering tab and an action is taken on that message based on its total spam weight.

An added benefit to SmarterMail's antispam administration is the ability to combat both incoming and outgoing spam messages. Most mail servers only allow Administrators to keep spam from entering the mail server. SmarterMail helps protect mail users from incoming spam but also includes the added benefit of keeping mail servers from actually sending spam, thereby helping to protect the mail servers from being blacklisted.

To view and modify the spam checks for your server, log into SmarterMail as an Administrator and click on the Settings icon . Then click on Antispam in the navigation pane. The Spam Checks , RBL Lists and URIBL Lists tabs can be used to create or modify existing spam checks and RBLs for the system.

Note: Only enabled spam checks are used when calculating spam weight. To enable or disable a check, enable the appropriate spam check in its configuration options.

### Spam Checks

In general, the following options may be available when creating a custom spam check or modifying an existing one:

- Enable Spool Filtering - When enabled, the weight assigned for the spam check is added to the message and used as part of its overall spam score. SmarterMail then handles the message based on the spam settings configured for a domain.

- **Enable Incoming SMTP blocking** - This option is used in conjunction with the SMTP Blocking settings configured in Antispam Options . When enabled, this spam check is counted toward to weight threshold for the blocking of incoming emails. As SMTP blocks are done at the IP level and not based on message content, some spam checks do not offer SMTP blocking. If this option is not available, then that particular spam check does not offer SMTP blocking and must rely on content filtering instead.
- **Enable for Outgoing SMTP blocking** - This option is used in conjunction with the SMTP Blocking settings configured in Antispam Options . When enabled, this spam check is counted toward to weight threshold for the blocking of outgoing emails. As SMTP blocks are done at the IP level and not based on message content, some spam checks do not offer SMTP blocking. If this option is not available, then that particular spam check does not offer SMTP blocking and must rely on content filtering instead.
- **Weight** - The weight range available for the spam check. Each spam check may utilize unique spam weight options.

### **Creating Custom Rules**

Email can be assigned spam weights based on the header, body text or raw content of a message. For example, the administrator can create a rule that assigns a specific spam weight to all messages containing the word "viagra" in the body text. To configure weights for custom rules, click New , then complete the following fields:

- **Rule Name** - The name of the rule.
- **Rule Source** - What you want the rule to be based on: a message's header, body text or raw content. Note: If you select Header you will need to supply header details separately from the Rule Text.
- **Rule Type** - The type of rule you use to evaluate the text for a match. Rule types are contains, wildcard or regular expression.
- **Rule Text** - The text that triggers the custom body rule.
- **Weight** - The amount to add to the email message's spam weight.

### **Cyren Premium Antispam**

The Cyren Premium Antispam add-on uses Recurrent Pattern Detection technology to protect against spam outbreaks in real time as messages are mass-distributed over the Internet. Rather than evaluating the content of messages, the Cyren Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge. For more information, or to purchase this add-on, visit the SmarterTools website .

- **Confirmed Weight** - The weight that will be assigned if the Cyren Detection Center determines the message as coming from known spam sources.

- Bulk Weight - The weight that will be assigned if the Cyren Detection Center determines the message as sent in bulk. Note: Newsletters or mailing list messages may be included in this classification.
- Suspect Weight - The weight that will be assigned if the Cyren Detection Center suspects the message may be spam because it was sent to a slightly larger than average distribution.
- Unknown Weight - The weight that will be assigned if the Cyren Detection Center is unable to determine the spam probability of a message. This should be treated similarly to a None Weight.
- None Weight - The weight that will be assigned if the Cyren Detection Center deems the message as not spam.

## **Declude**

Declude integration allows you to use Declude products in conjunction with the SmarterMail weighting system. Declude addresses the major threats facing networks, and are handled by a multi-layered defense. Configuration of Declude is done through the Declude product, so all you need to do in SmarterMail is enable the spam check and the Declude score will be included when calculating the total spam weight of a message. For more information, visit [www.decluce.com](http://www.decluce.com).

- Low Spam Weight - The weight that will be assigned if Declude determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if Declude determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if Declude determines a high probability of spam.

## **DKIM and DomainKeys**

DomainKeys and DKIM are an email authentication system designed to verify the DNS domain of an email sender and the authenticity of a message. While a possible source for determining whether an email is spam or not, neither is universally adopted so any weights assigned for failing these checks should be minimal. In addition, because the DomainKey method has become obsolete; we recommend utilizing DKIM instead.

- Pass Weight - Indicates that the email sender and message integrity were successfully verified (less likely spam). The weight you set may be 0 (for no effect) or a negative number, thereby reducing the spam rating.
- Fail Weight - Indicates that the email sender and message integrity verifications failed (most likely spam). Set this to a relatively high weight, as the probability that the email was spoofed is very high.
- None Weight - Indicates that there was not a valid DomainKey/DKIM signature found to

validate the sender and message integrity. Except in very special circumstances, leave this set to 0.

- Max message size to sign - The maximum outgoing message size you want the mail server to sign. By default this is set to 0, meaning all outgoing messages are signed.
- Max message size to verify - The maximum incoming message size you want the mail server to verify.
- Max key size allowed - Select the level of security you want used to sign each message. Default is set to 1024 bits. Setting this value higher may increase the CPU load on your mail server.

### **Message Sniffer**

The Message Sniffer add-on is an intelligent antispam scanner that uses advanced pattern recognition and collaborative learning technologies to accurately identify spam, scams, viruses, and other email borne malware before it gets to a user's mailbox. For more information, or to purchase this add-on, visit the SmarterTools website .

- Confirmed Weight - The weight that will be assigned if Message Sniffer determines the message as coming from known spam sources.
- None Weight - The weight that will be assigned if Message Sniffer deems the message is not spam.

### **Remote SpamAssassin**

SpamAssassin itself is a powerful, third party open source mail filter used to identify spam that can be easily used alongside SmarterMail. It utilizes a wide array of tools to identify and report spam. By default, SpamAssassin will run on 127.0.0.1:783. For more information, or to download SpamAssassin, visit [spamassassin.apache.org](http://spamassassin.apache.org) .

SmarterMail can use SpamAssassin with its weighting system:

- Low Spam Weight - The weight that will be assigned if SpamAssassin determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if SpamAssassin determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if SpamAssassin determines a high probability of spam.
- Client Timeout - The timeout that SmarterMail will impose on a server if it cannot connect.
- Max Attempts per Message - The number of times SmarterMail will attempt to acquire a SpamAssassin score for an email.
- Failures Before Disable - The number of times a remote SpamAssassin server can fail before it

is disabled.

- Disable Time - The length of time before the SpamAssassin server is re-enabled.
- Header Log Level - The amount of information SpamAssassin inserts into the header of the message

### **Reverse DNS (Domain Name Server)**

Reverse DNS checks to make sure that the IP address used to send the email has a friendly name associated with it.

- Weight - The default weight for this spam check. If an email sender does not have a reverse DNS entry, this is the value that will be added to the message's total spam weight.

### **SpamAssassin-Based Pattern Matching**

SmarterMail includes a proprietary pattern matching engine built upon the SpamAssassin technology as part of the default installation of the product. It includes a number of spam detection techniques, including DNS-based and fuzzy-checksum-based spam detection, Bayesian filtering and more.

- Low Spam Weight - The weight that will be assigned if the pattern matching engine determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if the pattern matching engine determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if the pattern matching engine determines a high probability of spam.
- Header Log Level - The amount of information the pattern matching engine inserts into the header of the message.

### **SPF (Sender Policy Framework)**

SPF is a method of verifying that the sender of an email message went through the appropriate email server when sending. As more and more companies add SPF information to their domain DNS records, this check will prevent spoofing at an increasing rate.

- Pass Weight - Indicates that the email was sent from the server specified by the SPF record (more likely good mail). The weight you set may be 0 (for no effect) or a negative number, thereby reducing the spam rating.
- Fail Weight - Indicates that the email was sent from a server prohibited by the SPF record (highly likely spam). Set this to a relatively high weight, as the probability that the email was spoofed is very high.
- SoftFail Weight - Indicates that the email was sent by a server that is questionable in the SPF record. This should either be set to 0 or a low spam weight.

- Neutral Weight - Indicates that the SPF record makes no statement for or against the server that sent the email. Except in very special circumstances, leave this set to 0.
- PermError Weight - Indicates that there is a syntax error in the SPF record. Since SPF is relatively new, some domains have published improperly formatted SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.
- None Weight - Indicates that the domain has no published SPF record. Since SPF is relatively new, many legitimate domains do not have SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.

## RBL Lists and URIBL Lists (Real-Time Blacklists)

RBL lists (also known as IP4R Lists) and URIBL lists are publicly accessible lists of known spammer IP addresses. These lists can be a very important part of spam protection. To attach a list, navigate to the appropriate tab and then click New . Dependent on the list you're adding, the following settings are available:

- Name - A friendly name for the list that will help you and your customers identify it.
- Description - This field allows you to store additional information about the list.
- Weight - The default weight for this spam check. If an email sender is listed with the spam list, this is the value that will be added to the message's total spam weight.
- Max Weight - The maximum weight that a single URIBL check can add to the message.
- Hostname - The hostname of the RBL.
- Required Lookup Values - The expected value(s) returned from an RBL if the sender's IP is listed with the RBL provider. Note: Multiple lookup values may be entered, separated by a comma.
- Enable Spool Filtering - When enabled, the weight assigned for the spam check is added to the message and used as part of its overall spam score. SmarterMail then handles the message based on the spam settings configured for a domain.
- Enable Incoming SMTP blocking - This option is used in conjunction with the SMTP Blocking settings configured in Antispam Options . When enabled, this RBL/URIBL is counted toward the weight threshold for the blocking of incoming emails.
- Enable for Outgoing SMTP blocking - This option is used in conjunction with the SMTP Blocking settings configured in Antispam Options . When enabled, this RBL/URIBL is counted toward the weight threshold for the blocking of outgoing emails.
- Enable bitmap checking - Enable this option if the RBL supports bitmapping. Bitmap checking can be used for RBL's and URIBL's that support this kind of spam check. For example, SURBL utilizes a multi-blacklist check. For more information and documentation on the appropriate usage, please visit [www.surbl.org/lists](http://www.surbl.org/lists) .

## Antispam | IP Bypasses

IP Bypasses allow an Administrator to prevent spam checks and greylisting on email delivered from specific IP addresses. Typically, this functionality is used to enter the address of an incoming gateway. In incoming messages, SmarterMail will analyze the .EML file and pull the most recent IP Address from the header, which will usually be an organization's incoming gateway. Inputting that IP address on this page will allow SmarterMail to analyze the IP of the originating server rather than focusing on the gateway that SmarterMail received the message from. This is important because the majority of the time, an organization's incoming gateway will not be listed on any RBL lists, but the originating server may be.

To access the IP Bypasses section, log into SmarterMail as an Administrator and click on the Settings icon . Then click on Antispam in the navigation pane and click on the IP Bypasses tab . To add an IP Address or IP Range, click New .

- IP Addresses - Enter the IP address or IP range that should be bypassed.
- Description - Enter a note for identifying the bypass.
- Bypass spam checks - Keep this option enabled in order to prevent spam checks on messages sent from the specified IPs.
- Bypass greylisting - Keep this option enabled in order to prevent greylisting on messages sent from the specified IPs.

## Antivirus

SmarterMail's default installation includes, at no additional cost, effective and self-updating antivirus protection with ClamAV. In addition, SmarterMail can support additional third-party solutions that include a quarantine directory as well as support for command-line antivirus solutions. SmarterMail also has the ability to check the quarantine directory and respond to users that attempted to send an email containing a virus.

To view the antivirus settings for your server, log into SmarterMail as a System Administrator and click on Antivirus in the navigation pane. The following settings will be available:

### Options

- Virus Quarantine - Allows you to specify the amount of time you want to quarantine any detected viruses.
- Quarantine Directory - The full path to the quarantine directory for the server. This is where emails that are allegedly infected with a virus are temporarily held.

## Command-Line Antivirus

Administrators can integrate SmarterMail with third-party antivirus programs via a command-line execution. This can be an efficient solution for high-volume mail environments by reducing the burden on the mail server itself.

Once a message comes into the SmarterMail spool, it will then be scanned for viruses using the command-line antivirus and any built in antivirus measures that have been enabled in SmarterMail. If the command-line scanner picks up a virus, it will be up to the command-line antivirus program to delete/quarantine the message according to the application's configuration.

- Enable command-line antivirus - Toggle the switch to the right to enable command-line antivirus.
- Command Line - The executable for the antivirus program. For example, if you'd like to integrate with ESET Endpoint Antivirus, you might enter something like: `C:\Program Files\ESET\ESET Endpoint Antivirus\ecs.exe /base-dir="C:\Program Files\ESET\ESET Endpoint Antivirus" /auid /arch //sfx /adware /clean-mode=Delete %FILEPATH`

Note: %FILEPATH will be replaced with the path to the file to be scanned.

## ClamAV

ClamAV is a third-party open source antivirus toolkit, designed especially for scanning email on mail gateways. ClamAV is included at no additional cost in the default installation of SmarterMail. For more information on ClamAV, visit: [www.clamav.com](http://www.clamav.com)

- Enable ClamAV - Toggle the slider to the right to enable ClamAV.
- ClamAV is on a remote server - Toggle the slider to the right if the server is a remote server.
- IP Address - The IP address of the ClamAV server to use.
- Port - The port that the ClamAV server is listening on.
- Timeout - The maximum number of seconds SmarterMail should wait for ClamAV to respond before moving on to the next message. By default, the timeout is 10 seconds.
- Failures Before Disable - The maximum number of ClamAV timeouts allowed before it is disabled. By default, ClamAV is limited to 5 failures.

Note: ClamAV's virus definitions are updated whenever the service starts and every 6 hours thereafter.

## Cyren Zero-hour Antivirus

The Cyren Zero-hour Antivirus add-on uses Recurrent Pattern Detection technology to identify viruses based on their unique distribution patterns and provides a complementary shield to conventional AV

technology, protecting in the earliest moments of malware outbreaks and continuing protection as each new variant emerges.

Cyren evaluates each message and determines the probability that the message contains a virus. For more information, or to purchase this add-on, visit the SmarterTools website .

- Enable Cyren Zero-Hour Antivirus - Toggle the slider to the right to enable Cyren Zero-hour Antivirus.
- Virus Result - Choose the default action taken on a message when Cyren determines that it has a definite probability of containing a virus. The available options are: Take No Action, Delete Message, Move to Junk Email Folder or Prefix Subject With Text.
- High Result - Choose the default action taken on a message when Cyren determines that it has a high probability of containing a virus. The available options are: Take No Action, Delete Message, Move to Junk Email Folder or Prefix Subject With Text.
- Low Result - Choose the default action taken on a message when Cyren determines that it has a low probability of containing a virus. The available options are: Take No Action, Delete Message, Move to Junk Email Folder or Prefix Subject With Text.

## Bindings

System Administrators can use this section to specify on which ports the server IP address(es) should listen, assign protocols to those ports or assign a hostname for each IP address. All ports being used should be assigned to at least one IP address on the server. However, SmarterMail provides system administrators with some flexibility when configuring bindings. This means, for example, that the system administrator can allow POP (port 110) on the IP 111.111.111.11 but not on the IP 222.222.222.22. In addition, some servers may have other programs installed that need to listen on mail ports. To accommodate this, the System Administrator can configure SmarterMail to listen on a subset of IP addresses, leaving the remaining IP addresses available for other programs.

Another benefit to binding IPs to your mail server is that you can limit the possibility of your entire mail server being blacklisted by assigning IPs on a per domain basis. That means that spammers sending messages on your mail server will only get their domain and their specific IP blacklisted rather than getting the entire mail server blocked.

To access SmarterMail's IP and port bindings, log into SmarterMail as a System Administrator and click on Bindings . The following tabs will be available:

### IP Addresses

Every IP address stored on the server's Network Interface Card (NIC) will be displayed in this section. Click on the IP address to open its configuration options. The following setting will be available:

- IP Address - The IP address from the server. This field cannot be edited.
- Hostname - The hostname that should be assigned to the IP address (e.g., mail.example.com). A hostname can be assigned to each IP address on the server. This is beneficial because it allows every domain on the server to be assigned its own IP address, thereby limiting the chances of the entire mail server becoming blacklisted should a user on one domain send out unwanted emails.
- Description - A friendly explanation of the binding's purpose.
- Ports - Select each port on which this IP address should listen. All ports being used should be assigned to at least one IP address on the server.

The IP Addresses listed in this section are pulled from the server and can only be removed from SmarterMail by removing the IP Address from the Network Interface Card (NIC). Occasionally, however, an IP address that is NOT stored in the server's NIC may appear in this list. These IP addresses can be removed using the Delete button, if desired.

## Ports

Use this section to assign specific protocols to ports or to add Secure Socket Layer (SSL) and Transport Layer Security (TLS) rules to any ports and protocols. To add a new port, click New . The following settings will be available:

- Protocol - The type of communications protocol that should be used (IMAP, LDAP, POP, SMTP, XMPP, or Submission Port).
- Port - The port number on which to listen for the selected protocol.
- Name - The friendly name for the port.
- Encryption - If the port requires SSL or TLS encryption, select the appropriate option. SSL always assumes the connection will be secure and sends the encryption immediately. TLS connects normally and then looks to see if the connection is secure before sending the encryption.
- Certificate Path / Password - If SSL or TLS encryption is selected, enter the complete path to the security certificate and its corresponding password.
- IP Addresses - Every IP address on the server will be listed here. Select the IP address(es) on which this port should listen.

## Delivery Limits

Below are the features available when viewing the Delivery Limits section of SmarterMail. To access this section, log into SmarterMail as a System Administrator and click on Delivery Limits in the navigation pane.

## Do Not Forward

The Do Not Forward list is a useful tool for preventing issues with companies that have extremely strict spam policies. For example, AOL and Comcast do not differentiate between the sending server and the server that forwarded a spam message, and as such, they commonly blacklist legitimate domains for forwarding spam. Because it's impossible to prevent ALL spam messages from being forwarded when a user has automated forwarding enabled, administrators may prefer to blacklist email forwarding to those strict domains.

Note: The Forwarding Blacklist only prevents the automated forwarding of email, which is configured in the user's general settings. Any messages that are manually forwarded from the Email section itself will bypass this blacklist.

To add a new forwarding blacklist, click New in the content toolbar. To Edit an existing blacklist, click on the card. To Delete an existing entry, click on the caret (□) shown in the upper right corner of the card and click Delete . To delete multiple entries at once, click on the Select button to open the multi-select tool. When adding or editing an entry, the following option will be available:

- Domain Name - Enter the name of the domain that should be blocked from automated email forwarding. When a domain is included in this list, users will see the following notification when they attempt to save a forwarding address with that domain: "Forwards to the following address(es) are not allowed: \_\_\_\_\_." Note: Users will still be able to manually forward emails to users on that domain.

## Sender Priority

This feature is only available in SmarterMail Enterprise.
---

Sender priority overrides allows the system administrator to assign priority levels to specific email addresses. For example, a company may want the mail server to send emails from its support team (support@example.com) before sending emails to mailing lists.

To create a new sender priority override, click New in the content pane toolbar. To Edit an existing entry, click on its card. To Delete an existing entry, click on the caret (□) shown in the upper right corner of the card and click Delete . To delete multiple entries at once, click on the Select button to open the multi-select tool. When adding or editing an entry, the following settings will be available:

- Email Address - The email address of the user or group.
- Message Delivery Priority - The priority level assigned to this user's messages.
- Description - A brief summary why the sender priority override was created.

## Reserved Domains

System administrators can prevent certain domains names from being added to SmarterMail. For example, domains that are already used for free email services, like gmail.com or yahoo.com, are ideal additions to the reserve list as allowing administrators to add such domains to SmarterMail could affect message delivery. Similarly, domains that are traditionally reserved for testing and documentation, such as test.com or example.com are also ideal candidates for the reserve list.

In general, the following actions can be taken:

- New - Adds a new Reserved Domain Name entry.
- Delete - To Delete an existing entry, click on the caret (▾) shown in the upper right corner of the card and click Delete. To delete multiple entries at once, click on the Select button to open the multi-select tool.

## System Events

This settings page is only available to Administrators of the SmarterMail installation.

The Event system in SmarterMail is an incredibly powerful and flexible tool that allows Administrators to automatically perform actions based on specific criteria and remain up-to-date with what is going on with the SmarterMail server, domains and user accounts. SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to users that need the information.

To create or view system events, log into SmarterMail as an Administrator and click on the Settings icon . Then click on Events in the navigation pane. To create a new event, click New . The following options will be available:

### General

- Event Name - The friendly name of the event.
- Event Status - New events default to a status of Enabled. However, to temporarily stop an event from triggering, you can change the status to Disabled.
- Event Category - The feature to which the event pertains: User, Mailing List, Alias, Throttling, Email or Collaboration.
- Event Type - The occurrence that triggers the event. Each category has several specific event types that can trigger the action.

## Conditions

Each event type has its own corresponding conditions. The global conditions that are seen across all event types are listed below.

- 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.

## Actions

Each event type has its own corresponding actions. The global actions that are seen across all event types are listed below.

- Send a notification - This option will send a notification to the Notifications window. It can also send a popup browser notification and an email.
- Send an email - This option will send an email to the specified address.
- Command Line Action - Execute a specified command line.

## Folder Auto-Clean

Folder Auto-clean is a method for limiting how much of a user's disk space is used by the Junk EMail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, Administrators can help ensure that user accounts do not fill up unnecessarily. Messages are deleted from the folders in the order that they were received so that older messages get deleted first.

To access the folder auto-clean settings for the server, log into SmarterMail as a System Administrator and click on Folder Auto-Clean in the navigation pane. The following settings will be available:

### Options

- Allow users to auto-clean inbox - Toggle the slider to the right to allow users to create auto-clean policies on the Inbox folder.
- Allow domains to override auto-clean settings - Toggle the slider to the right to allow Domain Administrators to create their own auto-clean policies for their domain.

## Rules

To add a new folder auto-clean rule that will apply to all users on the domain, click on New Rule .

If the Rule Type is set to Size, the following options will be available:

- Folder - The folder that will be auto-cleaned: Deleted Items, Junk Email or Sent Items.
- When size greater than (MB) - The maximum size of the folder, in megabytes. 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.

- Reduce to (MB) - The size the folder should be after the auto-clean process has completed, in megabytes. When auto-cleaning, SmarterMail will delete older messages first until the folder reaches this size. Note: This number should always be lower than the previous field.

If the Rule Type is set to Size, the following options will be available:

- Folder - The folder that will be auto-cleaned: Deleted Items, Junk Email or Sent Items.
- Days - The maximum number of days mail will stay in the selected folder before deletion.

## Gateways / Failover

### Outgoing Gateway

Gateway servers allow you to reduce the load on your primary server by using a secondary server to process outgoing mail. Gateway servers can also be used to combat blacklisting. If the gateway server gets blacklisted, simply rotate the primary IP on the network card to a different one to send out on the new IP.

To access the outgoing gateway settings, log into SmarterMail as a System Administrator and click on Gateways / Failover in the navigation pane. Then click on the Outgoing tab .

To add a new outgoing gateway, click New . When adding or editing an entry, the following settings will be available:

#### Options

- Server Address - The IP address of the gateway server.
- Port - The port used to connect to the gateway server. By default, the port is 25.
- Encryption - Select the type of encryption from the list.
- Status - The status of the outgoing gateway. To temporarily turn off the outgoing gateway, select Disable from the list.
- Priority - The priority level for this server. System Administrators can use gateway servers to only send mails with a certain priority level. For example, gateways can be used only for Low priority messages, such as newsletters or messages over a certain size, to reduce load and free up processing on the primary mail server.
- Enable Authentication - Toggle the slider to the right if your outgoing gateway server requires authentication. Then enter the Auth Username and Password below.
- Auth Username - The username of the gateway server given to you by your ISP.
- Auth Password - The password for your gateway server.

## SmarterMail Gateway

- Enable SmarterMail gateway mode - Toggle the slider to the right to indicate that the outgoing gateway server is another SmarterMail server.
- SmarterMail URL - The Webmail URL for the SmarterMail server being used as an outgoing gateway. This will allow the use of Web services to verify the users and domains.
- SmarterMail Username - The identifier used to login to the primary mail server.
- SmarterMail Password - The corresponding password used to login to the primary mail server.

## Incoming Gateways

The purpose of an incoming gateway is to reduce server load. Generally, spam checks and antivirus scans should be performed on the incoming gateway, freeing up the primary server processing for the delivery of messages.

To access the incoming gateway settings, log into SmarterMail as a System Administrator and click on the Settings icon . Then click on Gateways / Failover in the navigation pane and select the Incoming tab.

To add a new incoming gateway, click New . When adding or editing an entry, the following settings will be available:

### Options

- Gateway Mode - The function that the incoming gateway will perform. If the incoming gateway is set to backup MX, it will only receive messages when your primary server is down. If the incoming gateway server is set to domain forwarding, it will receive all messages and forward them to your primary server.
- IP Addresses (single or range) - The IP address, or range of IP addresses, of the primary mail server.
- Status - New gateways default to a status of Enabled. To temporarily stop an incoming gateway, you can change the status to Disabled.

### Domains

This card is only available if the gateway mode is set to Domain Forward. Domain forwarding allows you to easily send mail through one server to another. This will allow your server to act as an incoming gateway to your network, and permit you to have a single point of entry for incoming SMTP traffic.

When messages come in to a forwarded domain, they are run through the command-line exe referenced in the Protocols settings. If a delivery delay has been established for the server, messages

are also delayed accordingly. This allows you to establish an incoming server that can run external virus or spam scanners, which can reduce the load on your existing network servers.

Use this card to specify for which domains the incoming gateway will accept mail:

- Domain Verification - The method used by the incoming gateway to determine if a domain is valid or not: Specified Domains or All But Specified Domains. List the domain(s) below (one entry per field).

## SmarterMail Gateway

- Enable SmarterMail Gateway Mode - Select this option to indicate that the incoming gateway server is another SmarterMail server.
- SmarterMail URL - The Webmail URL for the SmarterMail server being used as an incoming gateway. This will allow the use of Web services to verify the users and domains.
- SmarterMail Username - The identifier used to login to the primary mail server.
- SmarterMail Password - The corresponding password used to login to the primary mail server.
  
- User Verification - The method used by the incoming gateway to determine if a user is valid or not. Note: If none is selected, the incoming gateway server will accept all email addresses for the domain. If Web service is selected, the incoming gateway will check with the primary mail server for a list of valid email addresses.

## Spam

Use this tab to specify the following spam checks:

- Not Spam Action - The action the incoming gateway will perform on messages NOT marked as spam.
- Spam Low Action - The action the incoming gateway will perform on messages with a low probability of being spam.
- Spam Medium Action - The action the incoming gateway will perform on messages with a medium probability of being spam.
- Spam High Action - The action the incoming gateway will perform on messages with a high probability of being spam.

## Configuring SmarterMail for Failover

### Who Should Use This

This document is intended for use by administrators deploying SmarterMail in high-volume environments and/or for organizations that want to ensure maximum uptime. It provides minimal

system requirements and considerations for deploying SmarterMail in a failover environment. Note: Failover requires activation of SmarterMail Enterprise. For licensing information for this product, contact the SmarterTools Sales Department .

## Failover Overview

SmarterMail Enterprise allows organizations to decrease the likelihood of service interruptions and virtually eliminate downtime by installing SmarterMail on a hot standby that is available should the primary mail server suffer a service interruption. For businesses that use their mail server as a mission-critical part of their operations, failover functionality ensures that the business continues to communicate and that productivity remains at the highest levels possible, even if there is a primary server failure.

To review the Failover Servers configured for an installation, log into SmarterMail as a System Administrator and click on Gateways / Failover in the navigation pane. Then click on Failover Servers tab .

## Understanding How Failover Works

The main components of failover functionality are a primary server that acts as the default SmarterMail server and manages the licensing of the server cluster and a secondary server that remains connected and available in a “hot standby” mode until the primary server experiences problems with network access or system hardware.

If the primary server fails, SmarterMail can be configured to automatically enable the secondary server. When this occurs, the secondary server takes over responsibility for processing background threads and supporting all email functionality. This server will remain in active status until another failure occurs or the primary mail server comes back online.

The initial set up of SmarterMail’s failover functionality entails system administrators manually disabling both the node and SmarterMail service on the primary server and then starting the node and SmarterMail service on the hot standby. However, system administrators can easily use third-party monitoring systems and script an automated failover and recovery strategy as needed. An example of this is provided at the end of this document.

## Minimal System Requirements

- A minimum of two servers running Microsoft Windows Server 2012 R2 64-bit or higher. (Windows Server Core is not currently supported).
- Three IP addresses
- Both servers must have their server times synchronized

- NFS/SMB share for mail and system files. We recommend that the share is running on a NAS/SAN that is configured as RAID 10

## Adding Network Load Balancing to Your Servers

Note: This needs to be performed on each server that will be used in the failover environment.

- Open the server manager console
- Right click on Features in the tree view and select Add Features
- Check the box next to Network Load Balancing and select Next
- Click Install
- Once the installation finishes, click Close

## Configuring the Load Balanced Cluster for Use with Failover

- Navigate to Start -> Administrative Tools -> Network Load Balancing Manager
- Click the Cluster menu item and select New
- In the New Cluster: Connect window, type the IP of your primary server in the Host: text box and select New
- When the Interface Name and Interface IP appear, select the Interface Name and click Next
- Since this is the primary node, ensure the host Priority is set to 1
- In the New Cluster: Host Parameters window, confirm the IP address and Subnet mask are correct and change the initial host state to Stopped . This is to prevent any issues with connectivity if a machine randomly reboots or suffers from a hardware failure. If all nodes are set to Started for their initial host state, traffic will be split between the two (or more) machines. Note: Monitoring software can be used to execute scripts that will start and stop hot standbys in the event of a failure and recovery. If you are not executing scripts via monitoring software then all failover will need to be handled manually.
- Click Next
- In the New Cluster: Cluster IP Addresses window, click Add and enter in your cluster IP address and the same subnet mask as in Step 6
- Select Next
- In the New Cluster: Cluster Parameters window, confirm the IP address and subnet mask, then enter a Full Internet Name , though this is optional
- Ensure the cluster operation mode is set to Multicast
- Click Next
- In the New Cluster: Port Rules window, click Edit
- If you want you can restrict the cluster IP to work on an individual port or across a port range. You can also simply allow the cluster IP to work across all ports on the server

- Ensure your port rules are set to Single Host in the Filtering Mode section
- Click OK
- Verify your settings and click Finish to complete the setup

## Joining Additional Nodes to the Cluster

- From the secondary server navigate to Start -> Administrative Tools -> Network Load Balancing Manager
- Click the Cluster menu item and select Connect to Existing . Note: the existing cluster will need to be running before a secondary node can be added
- In the Connect to Existing: Connect window, enter the IP address of your existing cluster as the Host and click Connect
- Select the existing cluster that appears in the Clusters section and click Finish
- In the main Network Load Balancing Manager , expand Network Load Balancing Clusters and right click on your Cluster (it may be the IP address of your cluster) and select Add Host to Cluster
- In the Add Host to Cluster: Connect window, enter the IP address of the secondary server in the Host: section and click Connect
- When the Interface Name and Interface IP appear, select the Interface Name and click Next
- In the Add Host to Cluster: Host Parameters window, confirm the IP address and subnet mask and ensure the Initial Host State is set to Stopped . As this is the second node you're adding to your cluster, the Priority should be set at 2
- Click Next
- Just as with the primary node, in the Add Host to Cluster: Port Rules window you have the ability to set this node to respond via specific ports or a port range. If you wish to set these rules, click Edit . Otherwise, click Finish to complete the setup
- Wait for the nodes to converge and, if necessary, stop the secondary sever by right clicking the second server's name, select Control Host -> Stop

## Configure a Shared Service Directory

- Using Network File Sharing (NFS) or Samba (SMB), create a shared directory named SmarterMail , preferably on a NAS or SAN. NOTE: We recommend that this shared directory be hosted on a server that utilizes a RAID 10 configuration for the data.
- Inside that new SmarterMail folder, create a Service folder
- Configure your permissions accordingly. If special permissions are required, configure the SmarterMail service to run with the proper credentials within the Windows Services console. Note: When performing updates to the software, the credentials will need to be re-applied to the service

## Configuring a Fresh Installation of SmarterMail for Failover

- Install SmarterMail Enterprise on a server. This will be your hot standby. Leave all setup information as the default settings and after setup is complete, configure SmarterMail as an IIS site.
- Stop the SmarterMail service on the hot standby
- Edit the failoverConfig.xml file in the primary server's Service folder as follows:
  - SharedSystemFilePath - Set to the shared network shared system folder
  - FailoverIPAddress - Set this to the IP address of the Network Load Balancer
  - IsEnabled - Set this to True
- Save this file, then copy it to the hot standby's Service folder and replace the existing failoverConfig.xml
- Copy over all folders, DAT and XML files from C:\Program Files (x86)\SmarterTools\SmarterMail\Service to the Service folder in the shared service directory you created
- Start the service on the hot standby server and verify that the paths are pointing to the network shared paths
- Activate your Enterprise key on the hot standby by logging into SmarterMail's management interface as the system admin and going to the activation section. Then stop the SmarterMail service on the server
- Start the service on the primary server, then reactivate your Enterprise license key in the SmarterMail management interface
- After re-activating the license, go to IP Addresses and bind all the ports to the load balancer's IP address and make sure no other IPs have any ports bound to them
- Both servers are now set up for failover. To verify this, log into the primary server as the system admin and go to Gateways / Failover . The servers that are part of the failover cluster will be displayed on the Failover Servers tab.

## Adding Failover to an Existing Installation of SmarterMail

Note: You will need to configure both servers for Network Load Balancing and set up a shared service directory. See the steps outlined in the Adding Network Load Balancing to Your Servers , Configuring the Load Balanced Cluster for Use with Failover , Joining Additional Nodes to the Cluster and Configure a Shared Service Directory sections earlier in this document for more information.

- Ensure the primary server is running the latest version of SmarterMail and that it is also configured as an IIS site. Ensure the IIS binding is pointing to your cluster IP address
- Install SmarterMail on a hot standby and configure it as an IIS site. Ensure the cluster node is

stopped on the hot standby and ensure the IIS binding is also pointing to the cluster IP

- Stop the SmarterMail service on the hot standby
- Copy all of your mail data (located in C:\SmarterMail\ by default) to your shared service directory. If possible, use robocopy to do this because it will not result in any downtime for the mail service
- Once robocopy finishes, run it one more time. This second pass will only copy any new data
- Stop the SmarterMail service on the primary server
- Edit the failoverConfig.xml file in the primary server's Service folder as follows:
  - SharedSystemFilePath - Set to the shared network shared system folder
  - FailoverIPAddress - Set this to the IP address of the Network Load Balancer
  - IsEnabled - Set this to True
- Run the robocopy one more time to copy over any modified files and remaining spool emails
- Copy over all folders, DAT and XML files from C:\Program Files (x86)\SmarterTools\SmarterMail\Service to the Service folder in the shared service directory you created
- Edit the domainlist.xml file in the shared Service folder and change the path of your domains to match the new NFS\SMB path. (For example, \\NAS01\SmarterMail\Domains\mydomain.com)
- Edit the mailconfig.xml file and replace any instances of the old physical path's with your new network location for SmarterMail. (For example, if all of your data was hosted on E:\Smartermail, you would then perform a find and replace for all instances of E:\Smartermail to \\NAS01\Smartermail).
- On the primary server, go to Start -> Administrative Tools -> Network Load Balancing Manager and stop the cluster node, then start the NLB on the secondary node
- Start the SmarterMail service on the hot standby
- Access SmarterMail's web interface at the cluster IP and sign in as the system admin
- Activate your Enterprise key on the hot standby by logging into SmarterMail's management interface as the system admin and going to the Licensing section.
- Verify that the data and settings are being picked up from the shared Service directory
- Stop the SmarterMail service on the hot standby and stop the secondary cluster node
- Start the cluster node and the SmarterMail service on the primary server
- Sign into the web interface on the primary server and re-activate the Enterprise license key by going to the Licensing section.
- Verify mail data and settings are being accessed from the shared service directory

## Scripting Failover

Below is an example of a PowerShell script that can be created to automate the SmarterMail failover process. You can utilize a third party monitoring product such as PRTG or SolarWinds (though there are many others) to execute this script when a failure is detected.

## Prepping PowerShell on the Servers

The servers will need to be configured to run remote scripts and accept remote PowerShell sessions. Therefore, on each server, run the following commands within an elevated PowerShell console:

- Set-ExecutionPolicy RemoteSigned - Press Y to accept
- Enable-PSRemoting -force

## Sample Script - Stop a Primary Server and Start the Hot Standby

In the scripts below, replace the “WAN” variable called in the `-hostname` parameter with the name of your interface. This can be obtained by opening a PowerShell console on the server and typing `Get-NlbClusterNodeNetworkInterface` . Also replace `Server01` and `Server02` with the NetBIOS names of your servers.

```
$StopPrimary = New-PSSession -ComputerName Server01 Invoke-Command -Session
$StopPrimary -ScriptBlock { Import-Module NetworkLoadBalancingClusters ;
Stop-nlbclusternode -HostName Server01 -InterfaceName "WAN" ; import-module
WebAdministration ; stop-webapppool SmarterMail; set-service -computerName
Server01 -name mailservice -status stopped ; remove-pssession Server01}
```

```
$StartSecondary = New-PSSession -ComputerName Server02 Invoke-Command -
Session $StartSecondary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Start-nlbclusternode -HostName Server02 -
InterfaceName "WAN" ; set-service -computerName Server02 -name mailservice
-status running ; import-module WebAdministration ; start-webapppool
SmarterMail ; remove-pssession Server02 }
```

## Sample Script - Stop the Hot Standby and Re-start the Primary Server

These scripts can be used to bring the primary server back online and stop the hot standby after your monitoring software issues an all-clear.

```
$StopSecondary = New-PSSession -ComputerName Server02 Invoke-Command -
Session $StopSecondary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Stop-nlbclusternode -HostName Server02 -
InterfaceName "WAN" ; import-module WebAdministration ; stop-webapppool
```

```
SmarterMail; set-service -computerName Server02 -name mailservice -status
stopped ; remove-pssession Server02}
```

```
$StartPrimary = New-PSSession -ComputerName Server01 Invoke-Command -
Session $StartPrimary -ScriptBlock { Import-Module
NetworkLoadBalancingClusters ; Start-nlbclusternode -HostName Server01 -
InterfaceName "WAN" ; set-service -computerName Server01 -name mailservice
-status running ; import-module WebAdministration ; start-webapppool
SmarterMail ; remove-pssession Server01 }
```

## General System Settings

Below are the configuration options available when viewing the General Settings section of SmarterMail. To access this section, log into SmarterMail as a System Administrator and click on General in the navigation pane.

### Server Info

- Hostname - The hostname of the server. Note: Hostnames should be in the format `computername.domain.com`.
- Primary DNS IP - The IP address of the primary DNS server. If left blank, the DNS server information will be pulled from the the Windows Networking settings (recommended).
- Secondary DNS IP - Enter the IP address of the secondary DNS server. If left blank, the DNS server information will be pulled from the the Windows Networking settings (recommended).

### 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 `<input type="text" value="Login to SmarterMail" />` text to be more in line with an overall brand message. Note: System Administrators can allow Domain Administrators to override the custom login screen by editing the Domain, enabling Login Display Customization in the Features section.

- Image for Login Screen - Upload an image, like a company logo, by dragging and dropping a file in the highlighted area or clicking to browse for a file (max file size of 3mb). Uploading an image 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 remain 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.

- Custom Login Text - Use this field to adjust the default "Log into SmarterMail" text with something more in line with an overall brand message. Toggle the slider to the right to enable the Custom Login Text.
- Login Background - Use this option to select the background image(s) that displays on your login screen. Use the default images that come with SmarterMail, point to your own path on the server or select a solid color background. For custom images, the following image formats are supported: SVG, PNG, JPEG/JPG and GIF. Minimum size is dependent upon the image type being used. However, you can use 1920 x 1280 as a general guideline.
- Check for Outdated Browser - When enabled, SmarterMail will check the version of the browser being used at the login page, and if it doesn't meet the minimum browser requirements, the user will see a screen asking them to upgrade their browser. SmarterMail does have some requirements that modern browsers meet -- things like WebRTC support for video conferencing, support for AngularJS and other newer technologies -- that ensure the ideal experience when using the SmarterMail web client. While older browsers may work, current browsers are highly recommended.
- 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.
- 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 Image on Login Screen, the div id "companyinfo" must be included.

## Custom Logout

- Logout URL - The URL to which users are redirected when they log out of SmarterMail. By default, users are presented with the log in page for the mail server. If this should be different, a new URL can be added. Toggle the slider to the right to enable the Logout URL.
- Domains can override Logout URL - Toggle the slider to the right to allow Domain Administrators to specify a Logout URL for their domain. If this option is not enabled, the option will not be visible to Domain Administrators.

## Custom Help

- 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.
- Custom Help Text - The hyperlink text for the custom URL in the Help menu.

## Reports

Use this tab to specify the following settings:

- Delete Server Stats (Months) - The length of time server stats should be kept before being deleted. By default, server stats are deleted after 13 months.
- Delete Domain Stats (Months) - The length of time domain stats should be kept before being deleted. By default, the domain stats are deleted after 13 months.
- Delete User Stats (Months) - The length of time user stats should be kept before being deleted. By default, the user stats are deleted after 13 months.

## Postmaster

- Postmaster Mailbox - This is usually the mail server System Administrator's email address, as this is where errors in email processing are generally directed.
- Postmaster delivery at domain level only - Select this option to use the domain-level postmaster address and avoid duplicate postmaster messages from being delivered.

## File Storage

SmarterMail's file storage feature allows users to upload files to the server and share them via public links. One benefit of using file storage is that it reduces the stress on the server by keeping large files out of the spool. Note: Files uploaded to the server are counted toward the user's disk space allocation, so system administrators should encourage users to delete any unused files whenever possible.

- Max File Size - The maximum size a file can be in order to be uploaded to the server.
- Root Webmail URL - The base URL of any file stored and shared in file storage. By default, the base URL corresponds to the domain the mail server is set up on (i.e., <http://mail.example.com>). If SmarterMail is configured on an external IP that allows a network address translation (NAT) to an external IP, the system administrator may need to modify the root URL.
- Extension Blacklist - Use this section to select and list any file types that cannot be uploaded to the server via File Storage. System Administrators may want to limit the capabilities of users to upload certain file types, such as executables (.exe) or other file types that can possibly be used to cause problems on the server.

## Attachments

- Incoming Extension Blacklist - This list allows you to limit the file types that are allowed INTO the mail server. For example, many email administrators won't allow executable files (EXE) as they can cause issues on the mail server, and possibly across an entire network. To

add a blacklisted file type, simply type in the file extension, one per line. (E.g., .exe or EXE)

- **Outgoing Extension Blacklist** - This list allows you to limit the file types that are users are allowed to send OUT OF the mail server. For example, many email administrators won't allow batch files (.BAT) as they can cause issues on the recipients' mail server, and possibly across their entire network. To add a blacklisted file type, simply type in the file extension, one per line. (E.g., .bat or BAT)

## Spool

- **Spool Path** - The full path in which messages are stored prior to delivery. If you are using a real-time virus scanner, this is the path that must be scanned in order to properly handle viruses.
- **SubSpools** - SubSpools are within the spool path and allow SmarterMail to work around the NTFS limitation of 30,000 objects in an individual folder. SmarterMail will utilize subspools by allocating up to 10,000 messages per subpool. (Default value is 10)
- **Delivery Delay (Seconds)** - This number of seconds mail will be held in the spool before it is delivered. A delivery delay is beneficial when you are running a secondary service (such as a virus checker) that needs access to messages prior to delivery, as it provides ample time for the secondary service to interact with the message. By default, the delivery delay is 1 second.
- **Retry Intervals (Minutes separated by commas)** - When the mail server is unable to contact the receiving server, the email attempting to be sent is held for a period of time before the mail server attempts to resend it. This is the time between retries. Users can specify multiple retry attempts to resend emails before it is bounced. By default, this is set to 4 attempts - at 15 min, 30 min, 60 min, and 90 min intervals.
- **DNS Errors Before Bounce** - The maximum number of attempts SmarterMail should make before the message is bounced due to a DNS error. The most common cause of a DNS error is a misspelled domain. Limiting the number of attempts before DNS errors are bounced is beneficial because messages will not sit in the queue for long periods of time taking up processing on the mail server and possibly slowing the system down. This will be helpful to users because messages will be bounced sooner and will give users the opportunity to fix any mistakes and get a message resent. By default, the server will make 2 attempts. Note: Setting this at 1 retry can be dangerous if the DNS server fails or if there is a loss of Internet connectivity. To disable this feature, set the number of bounces equal to the number of retry intervals.
- **Notify Senders of Delay After (Attempts)** - Sets the number of delivery attempts before the sender is notified that the email delivery is delayed. This can be beneficial as it lets the sender know that the mail server is still attempting to deliver the message but that the recipient has not received it yet. (Default value is 0.)
- **Command Line File** - Move the slider to the right to enable this option. Then enter the full

path to an executable you wish to use to process incoming messages. Use %filepath as an argument to pass the path of the email file to the executable. It is allowable for the executable to delete the message to prevent delivery. Example: If you set this field to "c:\program files\myexe.exe %filepath", the program myexe.exe will be launched with the full path to the spool file as its first argument.

- Command-Line Timeout (Seconds) - The number of seconds that the server will wait for information from the remote server. By default, the timeout is set to 5 seconds.

## Footer

System administrators can configure server-wide message footers that SmarterMail will append on all incoming and outgoing messages. Although similar to signatures, message footers are typically used to convey disclaimers or provide additional information. For example, a system administrator may want every message to include a notice that the message was scanned for viruses or the text "Sent by SmarterMail."

- Enable footer for all messages - Move the slider to the right to turn on the message footer for all incoming and outgoing messages.
- Apply to mailing lists - Move to slider to the right to enable this setting and append the message footer to mailing list messages. Note: Mailing lists have their own configurable footers. If a custom mailing list footer is already configured, enabling this option will append a second footer at the end of each message posted to the mailing list subscribers. Because this may be confusing for mailing list moderators and recipients, most administrators will choose to keep this option disabled.
- Domains can override footer - Move the slider to the right to enable this setting and allow domain administrators to configure a unique message footer for their domain.
- Footer - Use this section to create the message footer text. Clicking the edit icon will open a modal that includes an HTML-based editor, allowing admins to create footers that seamlessly fit into any email message. Note: The message footer does not support the use of variables.

## Licensing and Activation

SmarterMail installs as the Free Edition, which is good for use with 1 domain and up to 10 mailboxes. To upgrade to a paid version and unlock additional mailboxes and/or gain access to use purchased SmarterMail Add-ons , a license key must be activated. Furthermore, if the SmarterMail installation is moved to another server or upgraded to a different version or product level, the product will need to be activated again. System Administrators can use this section to activate SmarterMail or view current licensing information and limits.

Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request. If the server cannot connect for security reasons or due to internet connectivity, please contact [sales@smartertools.com](mailto:sales@smartertools.com) to request steps for a manual activation. A manual activation requires the server's hostname, which can be found by entering 'hostname' into the server's command prompt.

To access the Licensing section, log into SmarterMail as a System Administrator. Navigate to the Settings area, then click on Licensing in the navigation pane. The current licensing details for SmarterMail and its add-ons will be displayed, including the license key, license level information, status of the license or subscriptions, the number of items used out of the total limit, and an indication of whether an add-on trial is available.

The following actions can be taken:

- **Activate** - Select this option to activate a new SmarterMail license key. Activating a paid license requires authentication by verifying the SmarterTools account login credentials. Trial license keys do not require authentication to be activated.
- **Reactivate** - Select this option to refresh the limits of the SmarterMail installation. This will cause SmarterMail to callback to the SmarterTools servers to refresh the limits of the license key and should be used after purchasing an add-on, upgrading to the Enterprise edition or increasing the mailbox limit. Reactivating is immediate and does not require authentication with the SmarterTools account credentials.
- **Purchase** - Select this option to be taken to the SmarterTools website where you can purchase a new license key or add-on.
- **Start Trial** - If an add-on trial is available, a Start Trial button will appear on its card. This allows the system administrator to test the functionality for up to 30 days. A trial can only be activated one time. To continue using the service after the trial, the add-on must be purchased.

Note: The ActiveSync trial is limited to 25 Mailboxes.

Note: If you are running a trial version of SmarterMail, it will automatically revert to SmarterMail Free when the trial expires.

## Message Archiving

This feature is only available in SmarterMail Enterprise edition.
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Message archiving is a method of storing all email traffic for a domain -- either incoming messages, outgoing messages or both -- in a separate location on the mail server. Typically, this is a feature used

for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002 or other regulatory compliance.

By default, SmarterMail does not archive any messages. To specify which domains on the SmarterMail are archived, the system administrator will need to create archiving rules. Note: If the system administrator wants to allow individual domain administrators to search their domain's message archive then individual rules need to be set up for each domain. Setting the message archiving rules to "all domains" means only the system admin will be able to access message archive and search for messages on the mail server.

When archiving is set up, messages are automatically archived as soon as they hit the spool and before they are handled by any spam and/or content filters. This means that all messages are archived, not simply those that are delivered to a user's mailbox. (The exception to this rule is messages rejected due to SMTP Blocking. If a message is rejected due SMTP Spam blocking, it will never hit the spool and, therefore, will not be archived.) On a nightly basis, SmarterMail zips up archived messages and stores them to conserve disk space on the mail server. However, zipped messages are still searchable.

To view the message archiving rules for your installation, log into SmarterMail as a System Administrator and click on Message Archiving in the navigation pane. Then click on the Archiving Rules tab .

To create a new archiving rule, click on New . When adding or editing a message archive rule, the following settings will be available:

- Domain - The domain on the SmarterMail server to be archived.
- Archive Path - The directory on the hard drive in which archived messages are saved.
- Rule - Choose to save none of your messages, all messages, only incoming messages or only outgoing messages.

Once email archiving is set up, both system administrators and domain administrators can search the archives. Note: Please note that domain administrator search requires individual domain archiving rules to be set up, as noted above.

It is also important to know that archives are not deleted by SmarterMail and, as a result, they can get very large. Be sure to check your archive folders regularly to see if they should be backed up and removed from the hard drive.

## Archive Search

When performing a message archive search, the following search strings will be available: filter for all domains or a specific one, date range, the sender's address, the recipient's address or the subject.

When message archiving is set up for a specific domain, that domain's administrator can find a Message Archive Search option by clicking on the Settings icon . Domain administrators can search for a message by date range, the sender's address, the recipient's address or the subject.

## Password Requirements

To ensure the security of the mail server and its mailboxes, system administrators can specify minimum requirements for user passwords. To access the password requirements settings, log into SmarterMail as a System Administrator and click on the Settings icon . Then click on Password Requirements in the navigation pane. The password requirement settings will load and the following options will be available:

### Requirements

- **Minimum Password Length** - The minimum number of characters the password must have. Move the slider to the right to enable this setting.
- **At least one number** - Select this option to force users to include a number in the password.
- **At least one capital letter** - Select this option to force users to include a capital letter in the password.
- **At least one lowercase letter** - Select this option to force users to include a lowercase letter in the password.
- **At least one symbol** - Select this option to force users to include a symbol in the password.
- **May not match username** - Select this option to ensure that the username and password do not match.

### Options

- **Prevent common passwords** - Select this option to prevent users from configuring passwords that are included in the list of commonly used, insecure passwords. Note: The default location of the list of commonly used passwords is: C:\Program Files (x86)\SmarterTools\SmarterMail\Service\Common\_Passwords.xml.
- **Prevent previous passwords use** - Select this option to prevent users from using previously used passwords when changing their account password. Note: This setting prohibits old passwords from being used indefinitely. It is not based on a time interval.
- **Skip enforcement for existing passwords** - Select this option to allow changes to the password requirements to only affect new users or new passwords.
- **Enable password retrieval** - Select this option to allow users to reset their password if they forget it. Note: In order for users to utilize password retrieval, they must have a backup email address configured in their account settings.

## Expiration

- Passwords expire automatically - Toggle the slider to the right to enable password expiration, forcing users to update their account passwords at your specified time.
- Password Expiration (Months) - The number of months that a password is valid. After the specified time, a user's outgoing SMTP will be disabled and a password change will be forced upon Web interface login. Move the slider to the right to enable this setting. Note: If a user's 'Disable password changes' setting is enabled, their password will not expire.
- User Notification Timing - The interval(s) used to notify users of when their password will expire or when their auto-block grace period will end and, subsequently, their outgoing SMTP will be disabled. The default values are 28, 14, 7, 3, 2, 1 days. This means SmarterMail will send out warning messages to the user to change their password 28 days, 14 days, 7 days, 3 days, 2 days and 1 day before their password officially expires or the grace period ends if their password violates the requirements. Note: SmarterMail will send one, single notification for all missed intervals. For example, imagine "Auto-block Grace Period" is set for 30 days and the "User Notification Timing" is set at 60, 45, 25, 10, 2, 1. When a user is in violation, SmarterMail will send a single notification for the 60 and 45 day intervals then continue as normal at the 25 day interval.
- Auto-block Grace Period (Days) - The number of days a user can wait to update their account password before outgoing SMTP is disabled due to password policy violation. Note: This setting only applies if the "Disable outgoing SMTP when auto-block grace period ends" setting is checked.
- Disable outgoing mail after grace period ends - Select this option to disable outgoing SMTP after the auto-block grace period ends when a user's password does not meet the password requirements.

## Protocol Settings

To access the settings for standard email protocols, log into SmarterMail as a System Administrator and click on Protocols in the navigation pane.

### POP

Use this card to specify the following POP settings:

- POP Banner - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:

- #HostName# - The hostname of the IP address to which the connection is made.
- #ConnectedIP# - The IP address of the remote computer.
- #Time# - The system's local time.
- #TimeUTC# - The time in UTC.
- #UnixTime# - The number of seconds since January 1, 1970.
- Command Timeout - If the server receives a command that sends large amounts of data but the data stops coming in for this number of minutes, the command will be aborted. By default, the command times out after 5 minutes.
- Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 500.
- POP Retrieval Download Path - The path in which mail is stored from POP accounts until it is read.
- Max POP Retrieval Threads - SmarterMail is multi-threaded, meaning it can do more than one thing at a time. This setting is for the maximum number of threads you want SmarterMail to work on concurrently for retrieving mail using the POP protocol. By default, the maximum number of POP retrieval threads is 10.
- POP Retrieval Interval - The frequency by which SmarterMail checks for new POP messages. By default, the POP retrieval interval is 1 minute.

## IMAP

Use this card to specify the following IMAP settings:

- IMAP Banner - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:
  - #HostName# - The hostname of the IP address to which the connection is made.
  - #ConnectedIP# - The IP address of the remote computer.
  - #Time# - The system's local time.
  - #TimeUTC# - The time in UTC.
  - #UnixTime# - The number of seconds since January 1, 1970.
- Command Timeout - If the server receives a command that sends large amounts of data but the data stops coming in for this number of minutes, the command will be aborted. By default, the command times out after 15 minutes.

- **Max Bad Commands** - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- **Max Connections** - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 1000.
- **IMAP Retrieval Download Path** - The path in which mail is stored from IMAP accounts until it is read.
- **Max IMAP Retrieval Threads** - The maximum number of threads you want SmarterMail to work on concurrently. By default, the maximum number of POP retrieval threads is 10.
- **IMAP Retrieval Interval** - The frequency by which SmarterMail checks for new IMAP messages. By default, the IMAP retrieval interval is 10 minutes.
- **Enable IDLE Command** - Toggle the slider to the right to enable IMAP IDLE. IMAP idle is an extension of the IMAP protocol that allows a mail server to send status updates in real time. Through IMAP IDLE, users can maintain a connection with the mail server via any mail client that supports IMAP IDLE, allowing them to be instantly aware of any changes or updates. When enabled, SmarterMail will inform any connecting IMAP client that it accepts the IDLE command. Note: IMAP clients that do not fully support IMAP IDLE, like Microsoft Outlook, may use the command in such a way that it actually hinders performance.

## SMTP In

Use this card to specify the following incoming SMTP settings:

- **SMTP Banner** - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:
  - **#HostName#** - The hostname of the IP address to which the connection is made.
  - **#ConnectedIP#** - The IP address of the remote computer.
  - **#Time#** - The system's local time.
  - **#TimeUTC#** - The time in UTC.
  - **#UnixTime#** - The number of seconds since January 1, 1970.
- **Allow Relay** - If you are concerned about spam mailers using the relay function to send mail through your server or do not want any other mail server to use your SMTP server as a gateway, set this to Nobody (recommended). However, you can set the type of relays you will allow, should you so desire.
- **Nobody** - Restricts sent mail to only work via SMTP authentication and with accounts on the local SmarterMail Server (except for IPs on the White List).

- Only Local Users - Limits relay access to users (email accounts) for a valid domain on your SmarterMail Server.
- Only Local Domains - Limits relay access only to mail hosts (domains) on your SmarterMail Server.
- Anyone - Allows any other mail server to pass messages through your mail server, increasing the chances of your mail server being used for sending large volumes of messages with domains not associated with your local mail server. Selecting this option turns off statistics for all domains, due to the high amount of messages that are passed through the mail server with an open relay.
- Session Timeout - After a connection fails to respond or issue new commands for this number of seconds, the connection will be closed. By default, the session times out after 15 minutes.
- Enabled - Select this checkbox to enable the session timeout setting.
- Command Timeout - If the server receives a command that sends large amounts of data but the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 120 seconds.
- Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 1000.
- Max Hop Count - After a message gets delivered through this many mail servers, it is aborted by the software. This prevents looping due to DNS problems or misconfigurations. By default the max hop count is 20.
- Max Message Size - Messages greater than this size will be rejected by the mail server. By default, the max message size is 0 (unlimited).
- Max Bad Recipients - At times, spammers will hammer a domain with a dictionary harvesting attack. This means that software is used to send messages to many of the most common mailbox addresses (e.g., admin, user, contact, etc.) or username variations (e.g., alan@, alana@, alanb@, etc.) in order to find valid email addresses. Setting the max bad recipients means that after this many bad recipients (those that don't exist for the domain), the SMTP session will be terminated. This setting allows you to better protect yourself against email harvesting attacks. A value of 20 is recommended in most cases.
- Append Received Line - Select the option for appending the received line for all messages, only for SMTP Authenticated messages or for no messages at all.
- Require Auth Match - Select this to force a user's From: address to match their SMTP authenticated address, either by matching the entire email address or by matching just the

domain - or not requiring it at all. This setting helps keep senders from spoofing email addresses through email clients.

- Max Messages Per Session - The maximum number of messages that can be sent in one session. This is useful in handling cases where spammers will make one connection and then send a large amount of messages with that connection.
- Enable VRFY command - Toggle the slider to the right to allow others (including other mail servers) to verify an email address on the server. Note: Some people believe enabling VRFY commands is a security risk, so be sure to research the possible ramifications before enabling this feature.
- Enable EXPN command - Toggle the slider to the right to allow others to list all users associated with an alias or list. Note: Some people believe enabling EXPN commands is a security risk, so be sure to research the possible ramifications before enabling this feature.
- Allow relay for authenticated users - Toggle the slider to the right to enable the "Allow Relay" setting from above when users are required to use SMTP Authentication for sending messages.
- Enable Domain's SMTP auth setting for local deliveries - Toggle the slider to the right to enforce SMTP authentication for all local deliveries. For example, mail from user1@example.com to user2@example.com must be authenticated even though the message is bound for local delivery.
- Disable AUTH LOGIN method for SMTP authentication - Toggle the slider to the right to disable plain text authentication.

## SMTP Out

Use this card to specify the following outgoing SMTP settings:

- Outbound IPv4 - The IPv4 address used to connect to external SMTP servers when a message is sent by the domain. If multiple IPv4 IPs are on the server, they will be listed in the dropdown.
- Outbound IPv6 - The IPv6 address used to connect to external SMTP servers when a message is sent by the domain. If multiple IPv6 IPs are on the server, they will be listed in the dropdown.
- Use Primary IP if selections are unavailable - Toggle the slider to the right to have SmarterMail automatically fall back to the primary IP when a failure has occurred. SmarterMail will only attempt to connect once if this option is enabled.
- Command Timeout - If the server receives a command that sends large amounts of data but the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 60 seconds.
- Max Spam Check Threads - The maximum number of messages that can be spam checked at one time. By default, the maximum spam check threads is 30.

- **Max Delivery Threads** - The maximum number of messages that can be sent at one time to email addresses that are not on the local server. If a message cannot be sent, the SmarterMail server's multi-threading capabilities will move on to the next message and eventually get back to the one it skipped. This action can save tremendous amounts of time when compared to some other mail servers that stall the spool if a message cannot be sent right away. By default, the max delivery threads is 50.
- **Max Recipients Per SMTP Session (0 = Unlimited)** - The maximum number of recipients that can be included in one SMTP session. For example, with the limit set to the default of 500, an email containing 600 recipients would utilize two SMTP sessions for delivery - one with 500 recipients and the other with 100. This setting can be useful if a receiving server rejects sessions that exceed their allotted recipient limit. Note: Setting this limit to Unlimited is not recommended unless there is a specific case for doing so.
- **Enable DNS Caching** - Toggle the slider to the right to cache the results of DNS calls in SmarterMail. This can help speed up delivery of messages.
- **Enable TLS if supported by the remote server** - Toggle the slider to the right to use TLS (SSL encryption) if the server you are connected to supports it.
- **Append X-Smartermail-Authenticated-As-Header** - Toggling the slider to the right means that outgoing messages will have a new line item in the message header called "x-smartermail-authenticatedas" that demonstrates that the message sender was verified using SMTP authentication. This header can then be used by anti-spam services for validation.
- **Enable Remote Bounces** - Toggle the slider to the right to enable bounce messages from all senders. When unchecked, bounce messages are restricted to only internal senders. Note: This setting is enabled by default.

## LDAP

This feature is only available to Administrators using SmarterMail Enterprise.

Use this card to specify the following LDAP settings:

- **Session Timeout** - After a connection fails to respond or issue new commands for this number of seconds, the connection will be closed. By default, the session times out after 300 seconds.
- **Command Timeout** - If the server receives a command that sends large amounts of data and the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 120 seconds.

## XMPP

This feature is only available to Administrators using SmarterMail Enterprise.

Use this card to specify the following XMPP settings:

- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 1000.

## EWS

This feature is only available to Administrators using SmarterMail Enterprise.

- Modification Auto Clean - SmarterMail records when an account syncs using Exchange Web Services and stores those sync sessions in a file. This setting tells SmarterMail how long to keep those sync sessions before they are automatically purged from the file.

## Security

### IDS Rules

Through the use of SmarterMail's intrusion detection system (IDS), there are several methods for preventing abuse and denial of service (DoS) attacks on your mail server. For example, IDS rules (also known as abuse detection rules) can be configured to monitor a variety of activity on the mail server, including the number of connections coming from a single IP address, the number of messages sent within a specific timeframe, the number of login attempts and more. These rules allow SmarterMail to alert System Administrators of suspicious behavior or take action to prevent the attack.

To access the IDS Rules, log into SmarterMail as a System Administrator and click on the Settings icon . Then click on Security in the navigation pane and select the IDS Rules tab.

Jump To:

- Abuse Detection Overview
- Abuse Detection Rules

### Abuse Detection Overview

Some rules are configured upon installation by default. The following details can be seen for each entry in the list:

- Type - The type of Abuse Detection rule configured: Denial of Service (DOS), Bad SMTP Sessions (Harvesting), Internal Spammer, Password Brute Force by Protocol or Bounces Indicate Spammer.
- Service - The protocol service associated with the rule: SMTP, IMAP, POP, LDAP, or XMPP.

- Time Frame (Minutes) - The period of time that is examined to determine if the rule's action should be triggered.
- Threshold - The threshold that is examined to determine if the rule's action should be triggered. For example, the number of messages sent, the number of connections made from an IP address, the number of bounce messages received, etc.
- Block Time - The time frame, in minutes, in which the IP address will be blocked.
- Description - A friendly name or brief description of the rule.

Click on the Actions (...) button and then click Reset IDS Rules to replace all existing rules with the default configuration that's available upon installation.

## **Abuse Detection Rules**

To create a new Abuse Detection rule, click the New button. When adding or editing an entry, the following configuration settings will be available, based on the Detection Type chosen:

### **Denial of Service (DOS)**

Too many connections from a single IP address can indicate a Denial of Service (DOS) attack. Enable this option to block IPs that are connecting too often to the server. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists or make many connections if you enable this option.

- Service - Select the service that will be monitored for this type of attack: SMTP, IMAP, POP, XMPP or LDAP.
- Time Frame (Minutes) (Minutes) - The period of time in the past that is examined to determine if an IP address should be blocked. Too many connections in this period of time, and a block will be initiated.
- Connections Before Block - The number of connections before a block is placed. It is common for several connections to be open at once from an IP address. Set this to a relatively high value so that you can catch DOS attacks while not impacting legitimate customers.
- Block Time (Minutes) - The number of minutes that a block will be placed once an IP address hits the threshold.
- Description - A friendly name or brief description of the rule.

### **Bad SMTP Sessions (Harvesting)**

A bad session is any connection that ends without successfully sending a message. Many bad sessions usually indicate spamming or email harvesting. Leaving all of these options set to 0 (zero) will disable this type of abuse detection. Note: It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists if you enable this option.

- Time Frame (Minutes) - The period of time in the past that is examined to determine if an IP address should be blocked. Too many bad sessions in this period of time, and a block will be initiated.
- Bad Sessions Before Block - The number of bad sessions before a block is placed. A few bad sessions happen once in a while, for instance when a person sends an email to an email account that does not exist. It is not these people that you are targeting, but rather those that are attempting to compromise or harass your customers.
- Block Time (Minutes) - The number of minutes that a block will be placed once an IP address hits the threshold.
- Description - A friendly name or brief description of the rule.

### **Internal Spammer**

Enabling this rule in SmarterMail will block or quarantine an account from sending mail, as well as alert an administrator, whenever multiple emails from a single sender are delivered externally from the server during a specified time frame.

- Action - Choose whether to send a notification email only, block messages from the sender or quarantine messages from the sender.
- Time Frame (Minutes) - The period of time in the past that is examined to determine if the rule triggers. Too many emails from a single sender in this period of time, and the email notification is sent and the Action chosen is performed.
- Messages Before Notify - After this many messages are delivered within the time period specified, the email notification is sent and the Action chosen is performed.
- Block Time (Minutes) - The number of minutes that a block will be placed once an IP address hits the threshold.
- Notify Email - The email address of the administrator account to which the notification will be sent.
- Description - A friendly name or brief description of the rule.

### **Password Brute Force by Protocol**

A common ploy by spammers and hackers is attempting to guess passwords for users. Many times this entails continual log in attempts to an account using different passwords, each a bit different than the one before it. This thereby brute forcing the password.

- Service - Select the service that will be monitored for this type of attack: SMTP, IMAP, POP, XMPP or LDAP.
- Time Frame (Minutes) - The period of time in the past that is examined to determine if an login attempt is a brute force attempt. Too many connections in this period of time, and a block

will be initiated.

- Failures Before Block - The number of failed login attempts before the IP is blocked.
- Block Time (Minutes) - The number of minutes that a block will be placed once an IP address hits the threshold.
- Description - A friendly name or brief description of the rule.

### **Bounces Indicate Spammer**

Enabling this rule in SmarterMail will block or quarantine an account from sending out mail, as well as alert an administrator, after receiving a certain number of bounce messages in the specified time frame.

- Action - Choose whether to send a notification email only, block messages from the sender or quarantine messages from the sender.
- Time Frame (Minutes) - The period of time in the past that is examined to determine if the rule triggers. Too many emails from a single sender in this period of time, and the email notification is sent and the Action chosen is performed.
- Bounce Threshold - After this many bounce messages are received within the time period specified, the email notification is sent and the Action chosen is performed.
- Block Time (Minutes) - The number of minutes that a block will be placed once an IP address hits the threshold.
- Notify Email - The email address of the administrator account to which the notification will be sent.
- Description - A friendly name or brief description of the rule.

## **Blacklist / Whitelist**

System administrators are able to control the IP addresses that are blacklisted or whitelisted from accessing mail services. Blacklisting an IP address prevents it from making incoming connections, while whitelisting an IP address adds the IP as a trusted source, allowing connections to bypass relay restrictions that may be imposed. Exercise caution when granting whitelist status to a server, and be sure that you know what services on that server may send mail through your own.

To manage the blacklist or whitelist, log into SmarterMail as a System Administrator and click on the Settings icon . Then click on Security in the navigation pane and select the Blacklist or Whitelist tab.

To create a new entry in the blacklist or whitelist, click New . When adding or editing an entry, the following options will be available:

- IP Addresses - Enter a single IP address or an IP range in dotted quad notation (X.X.X.X). If an IP range is entered, all IP addresses within that range will be contained in the list. (ex:

192.168.1.26 or 192.168.1.1 - 192.168.1.255).

- Description - Use this field to enter optional notes for understanding the various whitelist / blacklist entries.
- Protocol - Toggle the slider to the right to enable the protocols you wish to include in the blacklist or whitelist entry. The available options are: SMTP, POP, IMAP, XMPP and SMTP Auth Bypass (for whitelists only).

Note: SmarterMail runs a check against the IPs listed in whitelist, blacklist and authentication bypass settings. This check looks at the number of IPs listed and will display a warning if the IPs listed represent a significant number. (E.g., a range greater than a /24.) While the warning does not affect the ability to save the settings, it is an indication that the administrator may want to review the settings prior to adding the IP range.

## SMTP Auth Bypass

Whitelisted IP addresses can bypass SMTP authentication, which is a security measure that can be very beneficial in the fight against spam and unauthorized email as it forces the sender to authenticate their username and password before an email is sent through the mail server. Unfortunately, some applications do not have support for SMTP authentication when sending mail. Most often, these are web sites that have automated mail sending mechanisms. The solution is to add the IP addresses of these servers/sites to SmarterMail's Whitelist and enable SMTP Authentication Bypass. Whitelist entries with SMTP Auth Bypass enabled will not be asked to provide an SMTP Authentication login.

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## SMTP Blocks

SMTP Blocks are an effective method for temporarily canceling a domain or individual user's ability to send email on the server. For example, if a particular account is sending an abnormal amount of email, you can add their address to the SMTP Blocks list, and they will be unable to send email until you remove them. Users and/or domains can be left on the list for whatever time you deem appropriate, and can be an effective stop-gap versus actually deleting the user and/or domain from the server.

To access the SMTP Blocks, log into SmarterMail as a System Administrator and click on the Settings icon . Then click on Security in the navigation pane and select the SMTP Blocks tab.

To create a new block, click on New . When adding or editing an entry, the following configuration settings will be available, based on the Block Type chosen:

### Email Address

- Blocked Address - The complete email address of the user.
- Direction - The types of messages that should be blocked from sending: Incoming, Outgoing or Both.
- Description - A friendly name or brief description of the block.

## EHLO Domain

- Blocked Address - This is the return value given when SmarterMail sends the EHLO or HELO command. A standard EHLO domain is the fully qualified domain name set up for the mail server you're wanting to block. (E.g., mail.smartertools.com). However, it IS possible that it will be something different based on whether the command is sent by the SmarterMail Web interface or an email client. For example, it may be the local IP address of the sending machine. Therefore, there is no well-established rule for what should be entered until some testing is done by the system administrator.
- Description - A friendly name or brief description of the block.

Note: SMTP blocking does NOT occur immediately when the EHLO command is given. Instead, a "soft" block is used and SmarterMail will fail any authentication attempts or RCPT TO commands. This is because if the failure occurs right after the EHLO command, any person attempting to spam from a mail server could figure out what the problem is and change the domain given with the command on each send. A "soft" failure should, instead, make the spammer believe he is using an incorrect password.

## System Messages

SmarterMail sends a variety of automated email messages for certain actions within SmarterMail. For example, system messages are sent to users when their password has expired or is in violation. Administrators can modify certain messages sent out from the server to make them match a company's voice and style, add extra information or add a standard From address.

To access this section, log into SmarterMail as a System Administrator and click on System Messages in the navigation pane.

Click on a message's row to edit the text. The following settings will be available:

- Subject - The subject of the email.
- Message Body - The message body of the email.
- From Address - By default, system messages send from "System Administrator" without a From address. Administrators can add a From address to allow users to respond to system messages or to decrease the likelihood a message will be caught by spam filters.
- Display Name - The friendly name or description of the sender that will appear in conjunction with the From address (if included) in the From field of the email.

## [Additional Help Topics](#)

### Automating Login to SmarterMail

Companies using SmarterMail can easily automate user entry into the mail application by configuring the auto-login functionality. The HTML code shown below demonstrates how you can make a text link on a website (e.g. "Log into your mail") that automatically logs a user in to the SmarterMail site. By putting this hidden form on a simple web page, you can fill in the "Domain", "Email Address", and "Password" information by hard-coding the data or through a scripting language like ASP, ASP.Net, or ColdFusion. This implementation of auto-login works seamlessly across domains, so the two applications do not have to be hosted on the same server.

Some notes about the example code listed below:

We have the form values set to generic text (e.g. "USERNAME\_GOES\_HERE") to show where you would hard code values that are submitted to the login page. You could also dynamically generate these values using a scripting language like ASP or ColdFusion. A sample ASP script would substitute `var domain = "USERNAME_GOES_HERE";` with `var domain = "<% =email %>"` .

The form action shown, `https://DOMAIN_GOES_HERE` , uses the default location of the Smartermail Web Interface. If you have created a separate web site for Smartermail or if you assign a different IP address for Smartermail within IIS, this action would have to be altered to reflect this change. For example, a modified form action might take the format of `https://mail.smartertools.com` . In addition, this code assumes that your SmarterMail site is secured with SSL/TLS. If it is not, be sure to change the 'var domain' URL from `https` to `http`.

```
Sample Code for SmarterMail 16.3.6855 and Higher <!DOCTYPE html>
<html> <head> <meta charset="utf-8"> <script> function autoLogin() {
var domain = "https://DOMAIN_GOES_HERE"; var username =
"USERNAME_GOES_HERE"; var password =
"PASSWORD_GOES_HERE"; var xhr = new XMLHttpRequest();
xhr.open('POST', domain + '/api/v1/auth/authenticate-user');
xhr.setRequestHeader('Content-Type', 'application/json;charset=UTF-8');
xhr.onload = function() { if (xhr.status === 200) { var success =
JSON.parse(xhr.responseText); if (!success.success) { var res = "";
if(success.message) res = success.message else res = success.status
document.getElementById("errors").innerText = res; return; }
window.location.href = success.autoLoginUrl; } else {
document.getElementById("errors").innerText = failure.message || failure;
} }; xhr.send(JSON.stringify({ username: username, password: password,
```

```
retrieveAutoLoginToken: true })); } </script> </head> <body
onload="autoLogin()"> <div id="errors"></div> </body> </html>
```

```
Sample Code for SmarterMail 16.0.6345 - 16.3.6843 <html> <head> <meta
http-equiv="Content-Language" content="en-us"> <meta http-
equiv="ContentType" content="text/html; charset=windows-1252 ">
<title>Smartermail Login</title> <script type="text/javascript"
src="https://ajax.googleapis.com/ajax/libs/jquery/1.7.2/jquery.min.js"></script>
<style type="text/css"> body { margin: 0; overflow: hidden; } iframe {
width: 100%; height: 100%; border: none; } </style> <script
language="JavaScript"> if (window.navigator.userAgent.indexOf("Edge")
> -1) alert('Unsupported browser'); function WaitToMail() {
setTimeout(GoToMail, 250); }; function GoToMail() { var username =
"USERNAME_GOES_HERE"; var password =
"PASSWORD_GOES_HERE"; var domain =
"https://DOMAIN_GOES_HERE"; var autoLogin = true; var
targetWindow =
document.getElementById('loginWindow').contentWindow;
window.addEventListener("message", function () { window.location.href =
domain + "/interface/root#/login"; }, false); targetWindow.postMessage({
'username': username, 'password': password, 'autoLogin': autoLogin },
"*"); } </script> </head> <body> <iframe id="loginWindow"
src="https://DOMAIN_GOES_HERE"
onload="WaitToMail()"></iframe> </body> </html>
```

The code above would automatically log the user into the SmarterMail interface. To auto-fill the user's login credentials instead, change `var autoLogin = true;` to `var autoLogin = false;` .

Also, please note that Microsoft Edge is not a supported browser for automating user login with this script because this version of the auto-login functionality relies on being able to set `sessionStorage` of the `iframe` and have that storage carry over in the redirect. In Edge, `iframes` have their own special storage that doesn't carry over to the actual site. Instead, Edge can have auto-login available through a bookmarklet, using the following code: `javascript: window.postMessage({username: "USERNAME_GOES_HERE", password: "PASSWORD_GOES_HERE", autoLogin: true}, "*");`

## Gateways and Other Server Roles

Please note that SmarterMail was designed to support one server in several of these roles. For instance, one server could act as an Incoming Gateway, Outgoing Gateway, or Backup MX.

SmarterMail can also take on one of these roles when placed together with a competing mail server product. For example, using SmarterMail as an outgoing gateway on a server other than your primary mail server may help to resolve problems with stability of other mail server software products.

### **Primary mail server**

- Use for storing email for defined users.
- Accessible through POP, SMTP, IMAP, and over the web.
- To configure:
- Follow instructions in online help

### **Backup MX Server**

- Use as a backup for mail delivery in case of short amounts of downtime or delivery problems on your primary mail server.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

### **Incoming Gateway server**

The FREE, one-domain version will suffice for virtually all environments.

- Use to host third party anti-virus and/or anti-spam software products in order to reduce load on primary server.
- Reduces load on primary server by managing all incoming sessions and performing abuse/intrusion detection.
- To configure:
- Enable domain forwarding and add all destination IPs and domain names that will be forwarded.
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- In DNS, change the MX records of your domains to reference the new gateway server.
- Install and configure any third-party anti-virus or anti-spam products, such as Declude JunkMail or Declude Virus.

### **Outgoing Gateway server**

The FREE, one-domain version will suffice for virtually all environments.

- Use as a delivery mechanism to reduce load on your primary servers.
- Also use as a method to combat blacklisting. If the server gets blacklisted, rotate the primary

IP on the network card to a different one to send out on the new IP.

- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

### **SmartGateway server**

The FREE, one-domain version will suffice for virtually all environments.

- Use as a delivery mechanism to balance the load on your gateway servers.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

## **Backup MX Servers**

A Backup MX Server is a mail server that will store (spool) your incoming email if your primary mail server becomes unavailable. A mail server can become unavailable to receive incoming mail for a number of reasons. For example:

- Hardware or software failure
- Very busy and unable to receive new incoming connections, or emails
- Network connection is down or saturated
- Network routing issues can also cause your mail server to become unavailable

### **Case 1 - No Backup MX**

If you do not have a Backup MX Server, the following conditions may occur:

- Email will be bounced (Returned to Sender).
- Your (inbound) email will cause a backup in the originating mail server's spool.
- Service Timeout. Depending on the Retry attempts by the originating mail server, your mailboxes may never receive their incoming email.
- Users do not understand bounce messages. To most users, bounce messages are unreadable, so when they can't send an email, they do not try to resend.

## Case 2 - With a Backup MX

How Email works when a Backup MX Server is involved:

- User sends an email to 'user@example.com' (a mailbox hosted by your SmarterMail Server)
- Their mail server looks up the MX Records for 'example.com' and finds two:
  - IP: x.x.x.x Weight: 10
  - IP: y.y.y.y Weight: 20
- Their mail server first attempts to connect to: x.x.x.x
- Connection fails, which could be caused by any of the above conditions
- They try to connect to the secondary MX record: y.y.y.y
- They successfully connect to this server.
- Email transmission begins, and the Backup MX Server receives the email into its spool.
- Since there are no existing local domains on this server, SmarterMail stores this email in its spool.
- Based off of the Retry Attempts, SmarterMail will continue to try and make connections to your Primary Mail Server.
  - SmarterMail will only make 4 retry attempts. It is recommended that you set the last attempt to a longer timeframe, i.e., 24 hours (1440 minutes)
  - This way SmarterMail does not send a Bounce Message to the originator saying that it could not deliver the message, before your Primary Server is back online.
  - If your Primary Mail Server comes back online before the final Retry Attempt, you can reset the Retry Counts on all messages in the spool. This will force the Backup MX Server to try forwarding all existing mail in the spool back to your Primary Mail Server.

## Configuring a Backup MX Server

- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

## Locking Down Your Server

Security is an ever-growing concern to business small and large. Because email servers are constantly under attack, SmarterMail has many features built into it to protect you. This topic explains steps you can take to protect yourself, your users, and your investment.

## What is Security for a Mail Server?

The word security has many meanings. SmarterTools' opinion is that mail server security is comprised of several types of protection:

- Protecting your data
- Protecting your users
- Protecting your service availability
- Protecting others on the internet

Below are some "Best Practices" for maintaining a locked-down server, one that can withstand the constant abuse that mail servers are subject to.

- Update SmarterMail regularly
- Disable catch-all accounts
- Restrict bounces and auto-responders
- Require SMTP authentication
- Encourage the adoption of SPF

## Update SmarterMail Regularly

SmarterTools is constantly working to improve SmarterMail and make it even more resistant to attacks. It is recommended that you keep your copy of SmarterMail up to date in order to stay protected.

Major and minor SmarterMail version releases are announced on our social media pages as well as the News items on the Support Portal . Email notices are sent to SmarterMail customers who are subscribed to receive these notifications. You can manage your mailing list subscriptions at My Account .

## Disable Catch-All Accounts

Catch-all accounts were popular in the past because of the flexibility they offer to a domain administrator. All an administrator had to do was add a catch-all account, and any mail that was mis-delivered would drop right into his mailbox. When catch-alls were most popular, spamming methods were not as sophisticated, and email harvesting attacks were not so prevalent.

Today, however, mail servers get attacked every minute of every day. Spammers assault email domains with thousands of spam messages sent to different email accounts in the hope that they will strike a hit to verify that the email account exists and to deliver another spam email.

In addition, if the catch-all user has an auto-responder enabled, the problem can be doubly harmful. Spammers rarely use their real email address, so if your user auto-responds to each of the thousands of messages above, and they happen to go to a large email provider, you will likely end up getting blacklisted as a spammer yourself.

As you can see, allowing the use of catch-all accounts exposes you to many types of abuse. SmarterMail allows catch-alls because it is expected in a mail server, but to lock down your server, we recommend the following procedure that will disable catch-alls:

- Alert your users that catch-alls are being disabled.
- Click on the Domains icon and edit the desired domain.
- Click on the Features tab.
- Uncheck Catch-All Alias .
- Click Save .

## Restrict Bounces and Auto-Responders

Email Bouncing occurs when delivery failures occur or a mailbox is full. A brief explanation of the error is sent back to the original sender of the message. Before spam became such a problem, this was usually not an issue. Today, however, spammers will sometimes spoof known spam trap accounts at places like SpamCop as the sender of the message. Thus, when your mail server bounces the message, the bounce ends up in the spam trap. Enough of these, and you'll be blacklisted.

The exact same is true for auto-responders that reply back to spoofed spam email.

SmarterMail allows you to restrict bounces and auto-responders to only those accounts that pass SPF checks, or to disable them entirely. SPF verifies that an email is not spoofed, and most of the serious spam trap accounts out there have SPF set up. To require SPF for bounces and auto-responders, do the following:

- Alert your users of the new policies being put into place.
- Click on the Security icon .
- Click on Antispam Administration in the navigation pane and then the Options tab.
- Change Auto-Responders to either Disabled or Require message passed SPF .
- Change Content Filter Bouncing to either Disabled or Require message passed SPF .
- Click Save in the content pane toolbar.

## Require SMTP Authentication

SMTP Authentication is an unspoken requirement of domains on modern mail servers. Any domain that does not have Authentication enabled is at a serious risk of being a relay for spam. Spammers will

try thousands of email accounts until they find one to send through, and if Authentication is not enabled, they will be able to use up your bandwidth and system resources to send mail.

Enabling SMTP Authentication ensures that users must supply credentials to send email from your server. This requires a change in their email clients so that the account information gets passed in SMTP, so there is often a bit of a learning curve. This process is necessary and important to protect your server, however, and without you are open for abuse.

To require SMTP Authentication for a domain, do the following:

- Alert your users of the change they will need to make to their email client. Due to the nature of this change, it is wise to give them a fair amount of warning.
- Click on the Domains icon and edit the desired domain.
- Click on the Technical tab.
- Check Require SMTP Authentication .
- Click Save .

It is also recommended that you update this setting in the default domain settings so that all new domains will require SMTP Authentication. In addition, to further secure the use of SMTP Authentication, you should ensure that "Require Auth Match" is set to Domain or Email Address for all domains. This means that a sender's "From" address must match the SMTP authentication address or domain, making it more difficult for users to spoof addresses. This can be done under the SMTP In tab of the Protocol Settings.

To apply this setting to all domains on your server at once, use the Domain Propagation page in the Settings menu.

## **Encourage the Adoption of SPF**

SPF is an excellent method of preventing email spoofing, protecting your users from having their domain show up on spam throughout the world. SPF, however, is only as effective as you make it, as it requires changes to your DNS servers for each domain you host email for.

It is in the best interest of all email users everywhere that domain administrators add SPF records to their domain that indicate what servers are authorized to send email for their domain. Encouraging your domain administrators to adopt SPF protects them from being the victims of spoofing, and reduces the spam threat on not only your server, but others throughout the world as well.

More information can be found at: <http://www.openspf.net/>

## Proper DNS Settings for Email

There are several major things to set up on your DNS server for every domain you set up within SmarterMail. How you set these up is dependent upon two things: who hosts your DNS and what DNS software is used. Therefore, you'll need to check with your DNS provider, or check your DNS server documentation, for instructions on how to set up the following records. NOTE: In the items below, simply replace "example.com" with the proper domain name.

Also, please bear in mind that your DNS may need to be set up differently. This is only a guideline that is recommended for most installations.

### General DNS Entries

There are several DNS entries that are required in order to run a mail server. These not only make the mail server visible to the world, but also can help ease the use of mail accounts by end users. Below, these are listed as well as their function.

- WebMail URL - In order to use a URL for allowing users to log in to their SmarterMail mailboxes, you'll need to add an A record for their domain. For example, "mail.example.com". This record will need to point to the IP address of the webmail interface for that domain.
- MX Record - This record should point to the A record you created. Again, "mail.example.com". This will allow other email servers to locate the mail server used for the domain.
- Reverse DNS Record - Add a reverse DNS record for any IP addresses assigned on the server to provide extra assurance to other mail servers. Also, it is recommended that the primary IP address of the server also have a reverse DNS record.
- Sender Policy Framework - Some large email providers like Gmail and Yahoo! require specially formatted TXT records to be added to your DNS. This special format is known as SPF (Sender Policy Framework). Information about how these records should be formatted can be found at <http://spf.pobox.com> . Please keep in mind that the owners of the domains may have significant input on what goes into these records.

### Optional, But Recommended DNS Entries

#### Autodiscover

Autodiscover is a way to allow users to quickly and easily set up accounts in email clients, both on desktop and mobile. Autodiscover is just that: a way for user settings to be discovered, automatically, by the email client. These settings include incoming/outgoing mail server info, ports used, etc. However, in order for autodiscover to work, it requires DNS entries.

To set up autodiscover in DNS, you need to add the following:

- A Record - This should be set to "autodiscover.example.com", and point to the IP address of that domain's mail server. (I.e, the IP assigned to the webmail URL.)
- SRV Record - This record returns the available domain and the service being used back to the client. The format for the SRV is "\_autodiscover.\_tcp.example.com". Here's an example of the SRV for SmarterTools:

```
Domain: smartertools.com Service: _Autodiscover Protocol: _tcp Priority: 0
Weight: 0 Port: 443
```

In addition to the DNS settings, above, you will also want to create a host header for your autodiscover URL in IIS that's tied to the SmarterMail web interface for a domain. As an example, SmarterTools has an IIS binding to ports 80 and 443 for "autodiscover.smartertools.com". This is in addition to the bindings created for "mail.smartertools.com" as that URL is what we use for setting up our mail clients and for accessing the web interface.

NOTE: Not all devices and email clients handle autodiscover in the same way. Therefore, just because you set up autodiscover doesn't mean it will work for each user.

## **DKIM**

Most major email providers require an additional layer of security before they'll accept incoming email. Free email providers like Gmail, Yahoo! and Outlook.com are using these "mail signing protocols" as a way to further protect their users from unwanted email and phishing schemes. Therefore, having DKIM set up for your mail domains is an very, VERY good idea.

To set up DKIM, you'll first want to enable it for a domain within SmarterMail. This is handled on the Domain Admin side, so if you're logged in as a system administrator, you'll need to impersonate the domain admin for any domain you set up with DKIM. Alternatively, you can Manage the domain as that automatically logs a system admin into a domain as the domain admin.

Once you're managing the domain, go to the domain's Settings page. On the Email Signing card, click "Enable". A modal window opens up containing both a Text Record Name and a Text Record Value . BOTH of these need to be added as TXT records to the DNS for the domain in order for DKIM to work. You can simply copy/paste the values into whatever interface is used for DNS management. For example:

```
Host Name: 8D48750357DA749._domainKey.example.com Text:
p=MIIBIjANBgkqhkiG9w0BAQEFAAOCAQ8AMIIBCgKCAQEAK+caX2o1xAtkGdQSNrtNNhvNCpfbdxOVTmm+o10E7
uKWYTqbFuyFEncusd1XGNQSC8Nzifn0qikrgSBG0xHUZJ+6GVcyQw42oRl7Kej1F8YY
bX4uHzLVv1uned21eDpSiSOLca2Q0arBtlyxzPNZ4P8YqujHydRsRwfJvYqvO9ge5eJFbEwCXq0d1bF8F
```

cCkm6gghYzQyaPPCpni8bu99uYwlqf7kJHEG4gH2YKhkYDgzg61+3wmu7gIv6ix3p5rBFmY6tC62d5p9Y8ZOyL1kFGMnvKc1CaxkTCoupBOfl1T0kDMzwht3RGClOk5DX3in6/80DQmwsFNfZkDa3QIDAQAB Time to Live (TTL): 5 minutes

Once DKIM is set up for a domain in SmarterMail, the domain administrator can modify the Settings and manage how closely the system monitors messages in transit. For more information, see the Settings page of SmarterMail help.

## Changing the System Administrator Login

By default, the login for the system administrator for SmarterMail is admin/admin . While this is easy to remember, it is also fairly easy to guess. When installing SmarterMail for the first time, you will be required to change this password during the setup wizard. Here are instructions in the manner you would want to change the system administrator password again.

### Instructions

- Login as the administrator with the current login.
- Click the Settings icon .
- Choose System Administrators in the navigation pane.
- Click on the Options tab and double-click on the Primary Administrator or right-click and choose Edit.
- Enter the current password for verification.
- Enter a new and password (If changing the username as well, avoid using an email address for the username).
- Click on Save .

### Resetting an Unknown Login

For instructions on how to reset an administrator login when the current login is unknown, please see the KB article [How To Reset an Administrator Username and Password](#) .

## Troubleshooting a Domain

There are times when you will need to access domain specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to login automatically as the domain administrator. This can be a useful method to examine domain settings or configure settings.

To impersonate a domain, click the Domains icon . Then select the desired domain in the navigation pane, right-click and choose Manage . Alternatively, you can select the domain in the navigation pane and click Manage in the content pane toolbar. A new window will pop up, and you will be logged in as

the domain administrator. From there, you may edit user accounts, content filters, or whatever other part of the domain that needs to be changed.

For instructions on troubleshooting specific user accounts on a domain, please see the topic [Troubleshooting an Email Account](#).

## Modifying Scoring for the SpamAssassin-based Pattern Matching Engine

System administrators can modify the scoring for the SpamAssassin-based pattern matching engine using the local.cf file. However, this feature is only recommended for experienced system administrators.

The local.cf file is placed in the service's SData folder. It is used to override existing tests or to create new tests supported by SmarterMail. Note: Any modifications to the local.cf file will not be overwritten when installing a new version.

### Overriding an Existing Test's Score

The most common modification to the local.cf file will be to override an existing test's score. For example, if a system administrator notices a lot of spam messages getting into his users' mailboxes that are failing a particular test, he may want to override that test's score.

To do so, the server administrator would add something like:

```
score TEST_I_WANT_TO_OVERRIDE 1.3
```

Here score is the keyword used by the engine, TEST\_I\_WANT\_TO\_OVERRIDE corresponds to the existing test they want to override and 1.3 is the new score.

### Creating a New Test

If a system administrator notices a new pattern appearing in spam messages that isn't covered by the default files, he may want to create a new test. This would look something like this:

```
body NEW_TEST /test/ #look for the word test in the body of the email score NEW_TEST 10.3
```

Here body is the keyword for determining the type of test, NEW\_TEST is the name of the new test, /test/ is the perl style regular expression that will be used while scanning the email, and everything after the pound-sign is a comment.

The system administrator will also need to score the new rule so that it has some effect on the final weight.

## Glossary

Below is an alphabetized list of the various terms and phrases used in the SmarterMail Product.

**Account** - An account consists of an email address and a password, used to log into a mail server to retrieve or send mail.

**Administrator** - The person or company that purchased and installed SmarterMail Professional Edition on a server with abilities to set global configurations and create and delete email domains and end users.

**Alias** - An email address representing another address that only forwards received mail to another address or group of addresses. For example, if your email address is you@example.com and you wanted to make an account for purchases without actually having separate inboxes to check, simply create the email Alias purchases@example.com and the mail for purchases will be redirected to your original mailbox.

**APOP** - APOP stands for Authenticated Post Office Protocol. Every mail connection made sends your username and password across the network in clear text (no encryption). With APOP, your password is encrypted while being transmitted over the Internet.

**Auto Responder** - A preconfigured message immediately sent back to anyone you receive an email from.

**Black List** - Block email from email addresses and domains added to this list.

**Content Filtering** - Content Filtering allows a user to search incoming messages for certain words or string of words. Messages containing the filtered items can be acted upon, for example deleting them so it never reaches its final destination, or moving them to a separate folder away from the main inbox.

**DNS Server** - A DNS Server is a computer designated to holding a list of domain names and their corresponding IP addresses. For the purposes of SmarterMail, some Domain Name Servers hold a list of domain names and IP addresses associated with mass spam mail outs. SmarterMail makes it possible for Administrators to enter the URL and take advantage of these Domain Name Servers to filter out mail from known spammers.

**Domain** - A domain is the name associated with the last half of an email address, it resides after the @ symbol (e.g. in support@example.com, example.com is the domain).

**Domain Administrator** - The owner of a particular domain responsible for adding and deleting email accounts and setting configurations associated with that domain. The domain administrator account also functions like a standard user account in that it can send and receive mail, manage contacts, etc.

**Domain Alias** - An additional domain that forwards received mail to another address or group of addresses. For example, you may have two email addresses with different domain names, to combine their inboxes, add one email address to the Domain Alias List.

**End User** - A person who uses SmarterMail to send and receive mail, or to manage a domain consisting of other end user email accounts.

**Folder Auto-Clean** - Automatic deletion of older messages when a folder reaches a certain size. Used to keep folders like Junk Email under control.

**Forward** - To redirect a received email to another email address.

**IMAP / IMAP4** - Internet Message Access Protocol (IMAP) is a standard protocol for accessing email from your local server. IMAP (the latest version is IMAP4) is a client/server protocol in which email is received and held for you by your Internet server. IMAP requires continual access to the server during the time that you are working with your mail.

**IP Address** - Internet Protocol address is the numeric physical address of any computer. Therefore, you can access a computer by entering either the domain name or the IP address for the domain (e.g. 127.0.0.1).

**IP Bypass** - Pardon IP addresses from SMTP authentication enabled on any domain. This is often used to allow clients who have applications that do not support SMTP authentication to bypass this check.

**IP4R / RBL List** - A DNS lookup that attempts to determine if a mail server is likely to be sending spam. You take the IP address of the mail server, turn it around, and query a "DNS zone", to come up with something like "2.0.0.127.relays.example.com". If the mail server is listed in the spam database you queried, it will return an answer indicating that the mail server is listed.

**Kill List** - A list of domains that are denied access to the mail server.

**LDAP** - Lightweight Directory Access Protocol (LDAP) is a communication protocol for accessing online directory services. Programs like Outlook and Thunderbird use LDAP to retrieve contact lists from SmarterMail.

**List Server** - A list server (mailing list server) is a program, or a feature in a program, that handles subscription requests for a mailing list and distributes new messages, newsletters, or other postings from the list's members to the entire list of subscribers as they occur or are scheduled. Note: A list server should not be confused with a mail server, which handles incoming and outgoing email for Internet users.

**Mailbox** - A folder that contains messages.

**Mailing List** - A mailing list is a list of people who subscribe to a periodic mailing distribution on a particular topic. Mailing lists include each person's email address. Mailing lists have become a popular way for Internet users to keep up with topics they're interested in. Many software producers and other vendors are now using them as a way to keep in touch with customers.

**POP / POP3** - With Post Office Protocol version 3 (POP3) your mail is saved for you in your mail box on the mail server. When you read your mail, all of it is immediately downloaded to your computer and no longer maintained on the mail server.

**Postmaster** - A required default email account for a domain. In order to receive email from the postmaster account, it has to be forwarded to another email address.

**Relay** - Allows an SMTP server to accept any email destined for other hosts and re-deliver that mail to the proper host, much like a field and track relay race where the SMTP servers are the runners and the email message is the baton.

**SMTP** - Simple Mail Transfer Protocol is a TCP/IP (Internet) protocol used in sending and receiving email. However, since it's limited in its ability to queue messages at the receiving end, it's usually used with one of two other protocols, POP3 or IMAP, that let the user save messages in a server mailbox and download them periodically from the server. In other words, users typically use a program that uses SMTP for sending email and either POP3 or IMAP for receiving messages that have been received for them at their local server.

**SMTP Authentication** - When the mail server requires an email address and password that matches an account in order to send mail, as opposed to requiring just an email address.

**Spam Check** - A resource used for checking the validity of an email sender.

**Spam List** - Some Domain Name Servers (DNS) on the Internet contain a list of addresses from mail servers that are solely used for email spam. Therefore, the Spam List is a editable list of DNS's so you can compare your incoming mail to those known spam email servers and filter them out accordingly (An example of an "anti-spam" DNS is [opm.blitzed.org](http://opm.blitzed.org)).

**Spam Weight** - The weight is a value assigned to a spam check according to its validity and competency. Generally, the higher the weight, the more likely an email message is spam.

**Spool** - A directory on the mail server that holds emails before they are viewed or downloaded from a client.

**Stats** - The overall calculations about email from a domain including total messages and bandwidth.

URL - The Uniform Resource Locator is an address that links to a web page or web server that is usually entered into the top of a browser.

User - A client with an email account.

Web Interface - The point of access for administrators and end users to the Mail Server via browser.

Web Mail - An interface for sending and receiving email through the use of a browser (e.g. Internet Explorer or Netscape) instead of an email program (e.g. Outlook). Configuring client side email is as simple as hyper linking to the correct URL and Logging in with a user name and password.

Web Service - A Web Service is a remote application interface that a program can connect to to obtain information or execute commands through standard internet ports (typically port 80, the same port used by a typical web browser)

White List - Add an email address to this list to accept all mail from the sender, regardless of Black List restrictions.

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At purchase of the Software and at other times during the term of this EULA You will be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g. credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

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In all events, conditions, and circumstances the provisions and limitations of Sections 3, 5, and 7 shall apply.

#### 12. Severability.

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein.

#### 13. Entire Agreement.

This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and

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