



# SmarterMail 2.x

Help Documentation

## SmarterMail Help

Welcome to the SmarterMail Help System. On the left you can find various topics that will help you use SmarterMail more effectively. Above, you can find links that will allow you to search the help, or visit our community forums. The forums are an excellent source of information from other SmarterMail users.

### 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
- Configuring Spam Filtering

### Common Help Topics for System Administrators

- Logging in for the first time
- Adding a domain
- Proper DNS configuration

## **General Information**

### **What is SmarterMail?**

SmarterMail gives email administrators and users and more power and control than ever before with the most flexible email server currently available.

SmarterMail is built and priced to be both beneficial and accessible to individuals, small businesses, and enterprise-level organizations alike, and is able to support anywhere from one to an unlimited number of domains and an unlimited number of email addresses. In addition to providing end users with advanced features like mail account statistics and precise user-controlled spam and content filtering, end users with administrator permissions for the domain have the ability to set and retrieve domain level statistics, provide domain-level spam and content filtering (versus having individual end users set their own), administer spam using any number of different spam and black lists (e.g. SpamCop, ORDB, and others), set domain-level aliases, implement SMTP authentication, and much more.

As an added benefit, SmarterMail is accessible from a standard web browser, giving administrators and end users email capabilities anytime, from anywhere. SmarterMail uses industry standard mail protocols, like POP3 and IMAP4 for incoming mail and SMTP for outgoing mail, and is compatible with the most popular desktop email clients (e.g. Microsoft's Outlook and Outlook Express or Qualcomm's Eudora).

### **How SmarterMail Works**

There are three main components that work together within SmarterMail: the Web Interface, the Windows Service, and the SmarterMail Web Server.

#### **Web Interface**

The Web Interface is a browser based administration platform that installs on a single server and supports administration of domains and email accounts as well as email account access by end users. End users are able to access and use their accounts using either web mail (email account access using a web browser) or with a desktop application (e.g. Outlook or Outlook Express, or Qualcomm's Eudora).

#### **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.

## SmarterMail Web Sever

The SmarterMail Web Server installs with the SmarterMail Web Interface by default, easing the implementation of SmarterMail and meaning that there is less configuration necessary for SmarterMail to work "right out of the box". This Web Server gives users and administrators access to the SmarterMail Web Interface from the Internet by utilizing the IP address assigned to the local machine.

NOTE: After installing SmarterMail, it is recommended that the Web Interface be moved from the SmarterMail Web Server to Microsoft IIS (if available) for more stability and security. For step-by-step instructions on how to make SmarterMail run under IIS, see Running Web Interface under IIS help topic.

## SmarterMail Server Requirements

The requirements of SmarterMail are minimal, so that SmarterMail can coexist with other applications on the same server. Below you will find the minimal requirements and a sample installation which may help you decide how much your hardware can process.

### Minimum Requirements

- Windows 2000, Windows XP, or Windows 2003 (all versions)
- RAM: 128mb
- CPU: PII 500
- DISK: 150 Megs
- IIS 5 or higher (Required if you will not use the SmarterMail Web Server)

It is suggested customers use IIS in place of the SmarterMail Web Server to provide additional security and stability. The intended purpose of the SmarterMail Web Server is so that the product is fully functional even without the existence of a marketed web server. IIS is an enterprise level web server, however, and SmarterMail takes advantage of many features in IIS which will provide the highest return on investment. For more information in using IIS to host the web interface, please click [here](#)

NOTE: All installations are different, and extra load caused by excessive messages or email accounts may skew the server requirements. SmarterTools recommends adding domains slowly to the server once you get close to these limits and watching how they impact your server. Also, it is important to realize that email patterns indicate that email messages per account are increasing roughly 60% every two years. Keep this growth in mind when planning your rollout.

### Sample Installation

500 Domains 25,000 Users 100,000 messages a day

- Windows 2000 or higher
- RAM: 256mb
- CPU: PIII 800
- DISK: Contingent on how much mail you allow end-users to save.
- IIS 5 or higher

## Browser Support Information

Various browsers interpret information from web pages differently. Due to the differences in browsers, various pages in SmarterMail may act differently based on the browser and OS being used. Below is a list of various supported browsers, as well as any known issues that may exist.

Windows Browsers	Version	Known Issues
Internet Explorer	5.5 +	No known issues
Internet Explorer	5.0	No known issues
Mozilla	1.4 - 1.7.1	No known issues
Mozilla Firebird	0.6.1	No known issues
Netscape	7.1	No known issues
Netscape	6.01 - 6.1	No known issues
Netscape	4.79 and Earlier	<ul style="list-style-type: none"> <li>• Not Supported - Upgrade your browser at <a href="http://www.netscape.com">http://www.netscape.com</a></li> </ul>
Opera	7.02 +	<ul style="list-style-type: none"> <li>• No HTML composing</li> </ul>
Opera	5.11 - 6.06	<ul style="list-style-type: none"> <li>• No HTML composing</li> </ul>

Linux Browsers	Version	Known Issues
Konquerer	-	<ul style="list-style-type: none"> <li>• No HTML composing</li> </ul>
Mozilla	1.4	No known issues
Mozilla Firebird	0.6.1	No known issues

Macintosh Browsers	Version	Known Issues
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Internet Explorer	5	<ul style="list-style-type: none"> <li>• Menu display irregularities</li> <li>• IE for Mac 5.0 is not recommended with SmarterMail. We suggest using a Mozilla derivative browser for the best experience</li> </ul>
Mozilla	1.4 - 1.7.1	No known issues
Safari	-	<ul style="list-style-type: none"> <li>• No HTML composing</li> </ul>

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# [Help for Email Users](#)

## [Mail](#)

### **Mail Overview**

SmarterMail has many features that allow you to access your email in an easy fashion. The topics in the help will assist you to understand how to use the most common features in SmarterMail.

- Mail Folders
- Viewing Messages
- Reading a Message
- Composing a Message
- Searching Messages
- Deleting Messages

### **Mail Folders**

A folder in SmarterMail is the general method of storing messages. Several folders have specific purposes, and you can also add other folders to store specific categories of mail. Common folders include Inbox, Drafts, Sent Items, Deleted Items, and Junk E-Mail. Some folders will be automatically created when you perform certain actions, like sending a new message. For more information about the specific purposes of the folders, see below .

From the Mail menu, choose Manage Folders to add or edit your folders. When you choose this item, a page like the following will appear.

New Folder - Clicking this button allows you to add a new folder to the system. More information about this process can be found below.

Go To Folder - Click on a folder name to see the messages contained in the folder. This has the same effect as clicking on a folder name in the sidebar.

Unread Messages - Shows the total number of unread messages contained in the folder.

Total Messages - Shows the total number messages contained in the folder.

Size - Shows the total size (in kilobytes) of all messages contained in the folder.

Rename - Use this link to rename a folder. It is unavailable on folders that have specific purposes, like Inbox or Deleted Items.

Delete - Clicking on the delete link will permanently delete a folder and all messages contained within it. Note that you cannot delete the Inbox.

## Adding a Folder

Folder Name - Enter the name of the new folder. As the note indicates, using a backslash character '\' will create a sub-folder, which can be useful if you wish to sub-categorize your email. Only lower ASCII characters are supported in the folder name, due to limitations with certain protocols.

Note: In order for the folders you create to become available from your email client (e.g. Microsoft Outlook) you will need to create a mail account with IMAP set as your incoming mail server type. If you use POP mail, you only have access to your mail account Inbox, not any folders that are created for storing mail. IMAP accounts are different than POP because they are directly connected to the server from the time you open an interface until the time it is closed. For this reason, deleted messages will be crossed out until they are purged from the folder. This is different from a POP account, when the messages are deleted, they are gone from the folder or erased.

## Special Folders

Drafts - When you are composing a message, you have the option to "Save as Draft." Choosing this option will save the email in this folder. Later, you can click on the email in the drafts folder to edit or send it.

Deleted Items - You can set up your account to save deleted items in this folder from My Settings. If you choose this option, ensure that you frequently clean out the messages in the folder to keep your disk space usage to a minimum.

Inbox - Incoming mail will usually come to this folder, unless you have specific content filters that redirect the email to another folder. Users that connect to their email via POP3 will only be able to download messages from this folder.

Junk E-Mail - Email that is likely to be spam may get sent to this folder, depending on your spam filters. You should review this folder regularly to ensure that no valid email is contained in it, and "Unmark as spam" any message that gets put here when it should not.

Sent Items - Any emails you send from the webmail will get placed in this folder if you have enabled the option in My Settings. Note that email sent from an email client, like Outlook Express, will not get saved in this folder.

## View Messages

When you log in, you will initially be taken to your Inbox. To view the contents of another folder, click on the folder name in the sidebar. This page allows you to manage your mail in many ways, which are all described below.

### Working with Email

**View a Message** - Click on a message in order to view it. This will take you to the Read Message page, which is described in more detail in the Reading a Message topic.

**Delete a Message** - Click on the delete link next to a message to quickly delete it. For more information about deleting messages and the different settings related to it, please see the topic [Deleting Messages](#).

**Sorting Messages** - Clicking on a column header will sort the messages by that field. Click again, and it will sort the other way. For example, clicking on the Size column header will sort items in order of size. Click the header again, and the sort will go in the opposite direction.

**Columns** - The following information is shown in the columns on this page (columns may vary for some special folders, like Drafts or Sent Items)

- **Check Box** - Check the boxes for messages you wish to move or perform actions on. Any items checked will be included in actions that you choose from "Choose an Action" or "Move to Folder." Clicking on the check box in the header will select all / none of the items.
- **Attachment Icon** - If the messages have an attachment, an icon will show up in this column.
- **Unread Icon** - This icon will appear if the message has not yet been read.
- **From** - The name / email address from which the message was sent.
- **Subject** - Subject of the message.
- **Received** - The day the the email was received into the mail system.
- **Size** - The size of the email, in kilobytes.

### Navigating Pages

Use the navigation area below the list of messages to browse through multiple pages of email. The highlighted page number is the current page you are viewing, and the arrows to the left and right of the pages allow you to go forward and back ten pages at a time.

### Disk Space Indicator

This indicator may appear if your administrator has specified limits on the amount of disk space that the email account can use. When you start to get close to your limit, it is recommended that you clean

out any old messages that you no longer need, especially those in Junk E-Mail, Sent Items, or Deleted Items.

## Actions

Choosing an action from the drop down list will immediately perform it on all checked messages. Depending on the folder you are in and the settings you have on your account, some actions in the list below may not be available.

- Delete - Deletes the selected mail. The action taken when a message is deleted is dependant upon the option chosen in My Settings. For more information see the topic [Deleting Messages](#) .
- Undelete - If you have chosen in your settings to mark messages as deleted, rather than purging them, then you will be able to undelete any deleted items that still appear in your message list. Please note that you cannot undelete purged email.
- Mark as Read - Will mark the checked emails as read and remove the Unread indicator next to them.
- Mark as Unread - This option will mark all checked items as unread.
- Mark / Unmark as Spam - In most folders, choosing the Mark as Spam option will delete the message, and add it to a list of spam messages for better spam protection later. This type of spam filtering, where you actually "teach" the mail server what you consider unwanted email, is known as "Bayesian Filtering". It is to your benefit to mark spam rather than just deleting it, because it helps you and others avoid that type of mail in the future. If a message is marked as spam and it should not have been, choose Unmark as Spam for the message when viewing it in Junk E-Mail (if available).
- Purge Deleted Items - This option removes all messages marked as deleted from the mail server. This option cannot be undone.
- Delete All Messages in Folder - This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not . This option is most useful in folders like Junk E-Mail or Deleted Items.

## Moving Messages

Choosing a folder from the drop down list will move all checked messages to the folder chosen.

## Reading a Message

The Read Message page in SmarterMail allows you to view the contents of an email message and perform various actions with the message. To read a message, click on it from the list of messages in a folder.

Along the top, there are several buttons, like Reply, Reply All, Forward, etc. Each of these buttons are actions that can be performed on the message you are currently viewing. Below that, you will see the header of the email. This contains information about the email message like the sender, subject, and the date the message was sent. Lower still, and you'll find the body of the message. Each of these sections will be explained below.

## Action Buttons

Prev / Next - Allows quick navigation between messages. These buttons may or may not appear depending on where you are in your list of messages.

Reply - Opens up the compose page that lets you respond to the sender of this message. In addition, the text of this message will be filled in to the new message as well.

Reply All - Operates similarly to the Reply button, but it also adds any email addresses in the To or CC fields to the response as well.

Forward - Takes you to the compose page and allow you to forward this message to someone else. The method that this email is put into the response can be customized by several settings in the My Settings page.

Mark as Spam - Moves this message to the Junk E-Mail folder and adds it to the list of Spam messages that are processed for statistical filtering. The more spam messages you identify using "Mark as Spam," the better the filter will get over time. This button will not appear while viewing the Junk E-Mail folder.

Unmark as Spam - Adds the message to an approved email list, adds the sender to your trusted sender list, and moves the message to the Inbox. This button only appears in the Junk E-Mail folder.

Delete - Deletes a message from your mailbox. After deleting it, the next message in your folder will show up instead. Note that there are several methods of deleting a message in SmarterMail. Please refer to the My Settings topic for more information.

Print - Prints the contents of the email without all of the extra navigation controls on the page.

Back - Takes you back to the folder you were in prior to reading the message.

## Email Header

From - Email address from which the message says it was sent

Date - Time and date when the message was sent

To - The email address(es) of the primary recipients of the message

Subject - The subject of the message

Attachments - If any attachments are included in the email, they will show up as links here. Be very careful when opening attachments in emails. Ensure that you know the sender and do not open any attachments you are not expecting.

HTML link - Displays the message in HTML format, which allows for colors and fonts

Plain Text link - Displays the message in plain text, which only allows text content with no special formatting or graphics

Header link - Displays the header of the message, which indicates the path the email took to get to your email account, along with several other pieces of information

Raw Content link - Displays the content of the email exactly as the server received it. This is helpful if you cannot view the message in any other display mode.

## Email Body

This section shows the content of the message. The default method of viewing messages is HTML, but it can be changed from the My Settings page.

## Composing a Message

There are several ways to begin composing a new message in SmarterMail. The most common method is to click on New Message in the sidebar. The only fields that are absolutely required to send an email are the To address and the Subject.

### Action Buttons

Send - Sends you message out to recipients

Save as Draft - Saves the message in its current state to the Drafts folder. If you do not have a Drafts folder, one will be created the first time you choose this option. You will then be able to go back to your Drafts folder and continue composing this email.

Spell Check - Pops up a spell-check that will help identify spelling errors in your email. Note that you can choose the dictionary to use from the My Settings page.

Add Files - Click on this button to add attachments to your email. Please bear in mind that there are limits to the size of attachments imposed by many email systems on the internet today.

Remove All Files - Removes all attachments from the current email. This button will only appear if you have added attachments to the email.

Cancel - Cancels the new message and returns you to where you came from

## Message Envelope Items

To - Enter a recipient's email address, or click on the "To:" link to select a recipient from your contact list. Separate multiple contacts with a semicolon (;)

Cc - The Cc field should contain recipients that should receive "carbon copies" of the message, but are not the primary intended recipients of the message.

Bcc - Bcc represents people who should receive copies of the email, but nobody else should know they received it.

Subject - Enter the primary subject of the message

Attachments - If you have added any attachments to the message, they appear below the subject line for your reference.

## Compose Area

Depending on your browser and your configuration settings, you may see an HTML editor or a text-only editor. Enter the content of your email in the box.

## Searching Messages

SmarterMail provides an easy way to find the emails you are looking for. In the sidebar, locate the Search Messages box and enter a search string into the top box. Then, choose what folder to look in, and what type of search you want to perform and click on Search . SmarterMail will then show you a list of all messages that match the search criteria, and you can click on a message to view it.

Please note that very large mailboxes will take longer to search. For faster searching, choose a specific folder before initiating a search.

## Deleting Messages

SmarterMail has two different methods for deleting messages. First, you can delete a message while viewing it by clicking on the Delete button. Second, you can delete multiple messages at once by checking them in the message list page and choosing Delete from the action menu.

The action SmarterMail takes when you delete a message depends on the option you choose in My Settings . Below are the options available for the option "When messages are deleted."

- Move to Deleted Items folder - (default) - When items are deleted they are moved to a folder called Deleted Items. If the deleted items folder does not exist, it will be created the first time

you delete a message.

- Delete message and purge folder - When messages are deleted from a folder, they are only marked as deleted. They are not physically removed from the folder until it is 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 as deleted. If the folder is then purged all items marked for deletion will be removed.
- Mark as deleted and hide - Any message that has been marked as deleted, will be hidden. This will allow you to keep deleted messages, without seeing them every time you log into your mailbox. Note: It is important to keep an eye on your email account disk usage when using this option, as your mailbox may be more full than you realize.

Note: The action taken for deleted items will ONLY be taken when deleting items through web mail. Deleting an item from Outlook Express or another email client will NOT use the setting that you choose.

Note to POP3 users: When your email client connects to SmarterMail via POP3, it will automatically purge any emails that are marked as deleted. To prevent this from happening, use the "Move to Deleted Items folder" option to avoid accidentally purging deleted items.

## **Effects of Folder Auto-Clean**

Your system administrator may have established auto-clean policies that may delete older junk e-mail, deleted items, and/or sent items when the folders get too large. Your administrator may have left the option available for you to override auto-clean settings, however. To see what folders are currently set to auto-clean and to change settings, refer to the My Folder Auto-Clean page.

## **Contacts**

### **Contacts Overview**

SmarterMail allows you to keep not only the email addresses of all of your important contacts, but all of their other professional information as well. All contact information, like all features of SmarterMail, is accessible through the web interface from anywhere on the internet. When you add contacts, you also have the ability of marking them as favorites, which allows you to quickly access them from the menu.

## Managing Contacts

This page displays all contacts by name with the ability to edit or delete each contact. At the top of the list is a search field where you can enter content to find a contact by name or email address.

Add Contact - Click on this button to add a new contact. [more info](#)

Search - Enter the search string into the first box, choose the field you want to search from the second box, then click on the Search button to find all contacts matching your search string.

Editing a Contact - Click on the row of a contact to edit it. You will be taken to a page almost identical to that of the Add Contact page.

Email address link - Click on a contact's email address to begin composing a message to them.

Delete link - Use this link to delete the contact on the corresponding row.

## Adding a Contact

Select "New Contact" from "Contacts" in the main menu and enter information about the contact you wish to add. When you are done entering data, click on the Save button to save the contact.

You may also add a new contact by clicking on the Add Contact button in the Manage Contacts page.

Fields you can edit include:

- Full name
- Email address
- Instant messenger address
- Personal website
- Birth date
- Add to favorites (Note: Checking this box will add the contact to the Contacts menu, allowing you to send an email to that person by simply clicking on their name)
- Home / Mobile / Work phone
- Home address
- Company name
- Company title / position
- Company address

## Reports

### **My Statistics**

The My Statistics report allows you to monitor the activity of your account and see how much disk space is currently being used. This information is especially important to be aware of in situations where your hosting company or service provider may have limits to the amount of bandwidth or disk space accounts can use.

Start date - The date that you want the report to start calculations from

End date - The date that you want the report to end

Generate report - Clicking on this button will generate the report, which causes the items below to show up

Received messages - The number of email messages that came in to this account over the time period

Sent messages - The number of email messages that were sent out from this account over the time period

Bandwidth received - The number of kilobytes(KB) that were received into this account over the time period

Bandwidth sent - The number of kilobytes(KB) that were sent from this account over the time period

Space used - The current amount of disk space used. Note: This is the current disk space usage and does not change based on the date range chosen

## Settings

### **My Settings**

The options in the My Settings page allow you to customize the way SmarterMail works. No changes are saved until you click on the Save button. The options are each explained below.

#### **User Information**

Username - Your email address as it should be entered in email clients to get your email

Full name - Your full name will be included in the From field of emails

Reply-to address - If you wish to have replies to your emails sent to a different email address, enter it here

Forwarding address - If you wish to send copies of all incoming mail to a different email address, enter it here. For example, if your mobile phone has an email account and you will be away from your computer, enter the mobile phone's email address here to receive the emails on your mobile phone. You can only forward to a single email address. If you need to send to multiple addresses, have your domain administrator create a user alias for you

Forwarding exclusions - If you wish to limit what emails are sent as forwards, you may choose to do so with this option to avoid forwarding spam.

Delete message on forward - Check this box to delete the message from the inbox of the original email account after forwarding it to the new email address

Signature - Add text to this area for a 'signature' that will display at the bottom of each email message that is composed in the web interface.

## Password

Password - This field is replaced with '\*'s in order to protect your password. It is shown so that people do not feel that their password must be changed when they get to this screen

New password - If you wish to change your password, enter a new password in the space provided

Confirm password - In order to ensure you typed your new password correctly, enter it again in this space

Note: If you do not wish to change your password, you may leave the password fields blank.

## Display Settings

Sort messages by - When viewing the messages in a folder, they will be sorted according to the option chosen in this drop down. By default, messages are sorted by date in descending order.

Sort folders by - When viewing the manage folders page, folders will be sorted in this order.

Messages per page - When viewing the messages in a folder, this option lets you customize how many emails will appear per page.

Message list refresh rate - If this box has something besides Never chosen, the page that shows messages in a folder will automatically refresh after the chosen number of minutes.

Display messages as - While you can choose to view a message in plain text or HTML while reading it, this option will allow you to choose the default viewing method.

- Plain Text - This option will only display text. While it is less interesting (no fonts, images, etc), it is also much more secure and is faster to view than HTML.
- HTML - This option will display HTML content, if present in the email. This content can include stylistic elements, like fonts or colors, as well as hyperlinks and other formatting elements.

When messages are deleted - Choose what happens to messages when they are deleted. The options are outlined below. For more information about deleted items, refer to the topic [Deleting Messages](#) .

- Move to deleted items folder - Deleted items will appear in the deleted items folder, which will need to regularly be emptied manually
- Delete message and purge folder - Remove the message and get rid of any other email messages that are marked for deletion
- Mark as deleted - Does not actually delete the message. Flags the message for deletion, and it will not get removed until the folder is purged
- Mark as deleted and hide - Does the same thing as "Mark as deleted" above. 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

Enable hover bar in tables - In some browsers, the hover bar may take up too many resources.

Disabling this option will still allow you to click on rows to edit items and view email, but will not show the hover bar.

## Compose Settings

Spell check dictionary - Choose from any of the dictionaries that the administrator has installed on the server

Compose messages as - Choose the method of email composing that you would like to use.

- Plain Text - Use this for a simple method of email editing. You will not be able to change colors or fonts, but your emails will generally be much smaller and readable on more email clients
- HTML - Use this option if you wish to add stylistic elements to your emails

Text Encoding - Choose the encoding that you wish to use for outgoing messages. Encodings define what character sets are used in messages you compose through the web interface.

Compose window size - Choose the edit window size from this drop down that best works with your browser. Recommended is small for resolutions smaller than or equal to 800x600, medium for 1024x768, and large for resolutions equal to or higher than 1280x1024.

Forwarding method - There are several methods by which a message can be forwarded. Please see the list below to understand each of them.

- Normal - Includes original content, including font styles from original message, as part of the new message
- Plain text only - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links or fonts.
- Embed as attachment - Attaches the original message to the new one. The message will not appear in the body of your message.

Reply header type - Choose whether to include a shortened basic header in your replies, or the full header instead. For most users, basic headers will be sufficient.

Reply indicator - If your compose method is plain text, this character will get added to each line of the original message in order to distinguish it.

Include previous replies in reply - If checked, the message you are replying to will get embedded in the new message.

Save copy of replies in Sent Items folder - If checked, all messages you send from the web interface will get saved in the Sent Items folder. If you send many messages, you may need to regularly delete items from the sent items folder.

## My Auto Responder

The auto-responder is an automated message that will be sent as a reply to all incoming email. Many people use auto-responders as vacation messages or confirmations of receipt of the message.

Enable Auto-Responder - This check-box allows you to quickly turn the auto-responder on or off.

Limit responses to one per day per sender - This will ensure that an email address only receives your auto-responder once per day, even if they send you multiple messages. If you disable this option, every email will get responded to. It is recommended that you keep this option turned on.

Subject - Enter a subject for your auto-responder (e.g. Vacation)

Body - Enter a body, or text that you would like to include in the automatic response, for example, "I am on vacation in Hawaii, and will not have access to a computer until Monday."

## My Content Filtering

Content filtering is an advanced method of performing actions on emails that meet specific criteria.

You can use content filters to delete specific messages, forward them to another account, or even alter the subject of specific types of email.

## Content Filter List

Add Filter - This button starts the Add Content Filter wizard which is explained in more detail below.

Delete All - Clicking this button will delete all content filters for your account. Once you confirm the action, it is not reversible.

Editing a Filter - Click on a filter's row to edit it.

Delete link - Deletes the action on that row. No confirmation dialog will be shown.

Move arrows - Click these arrows to change the order of the content filters.

Note: The order in which the filters appear does affect the way emails are handled. Once a filter succeeds and an action is performed on the message, no other filters are run for that message.

## Add / Edit Content Filter

The Add Content Filter wizard is three pages long, and it will walk you through each step necessary to create the filter.

### Step 1 - Filter Criteria

In this step of the wizard, choose the type of things that the filter will look at. Possible filter criteria types are listed at the end of this help topic. Multiple criteria can be chosen, and you can choose in the next step whether all criteria must be met, or only one of the criteria for the filter to activate.

### Step 2 - Filter Type and Criteria Details

Choose whether this filter requires all criteria to be met, or just one of the criteria to be met before it performs an action. Then choose whether you will be using any wildcards in your search strings. Usually, wildcards will not be necessary, but there are times when some people may want them.

For each of the criteria you chose in step 1, you will be able to enter details. Many types of content filters allow lists of items to be entered in, and these will be indicated. For example, if you chose to filter on From Address, you can enter multiple email addresses in the box (one per line) and if a message is from any of them, the filter will fire.

### Step 3 - Rule and Actions

A summary of your content filter rule will appear near the top of the page. Check that it is filtering the way you intend, and enter a name for the rule so that you can easily identify it later.

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

- Delete message - Deletes the message so that it will never arrive at your Inbox. Messages deleted through content filtering are not recoverable.
- Bounce message - Sends a message back to the sender of the email saying that the message was bounced. Note that the message is still delivered to you unless you choose to delete it as well.
- Move message to Junk E-Mail folder - Does just what it says. If the Junk E-Mail folder does not exist in your account, it will be created the first time a message tries to get put into it.
- Move message to custom folder - Choose a folder from the drop-down list and the message will be delivered there instead of your Inbox.
- Prefix subject with comment - Useful for categorizing emails, the subject line will be altered to include the text you specify in the Comment box.
- Embed header line into message - Includes an email header into the message, which can be useful when performing additional filtering through Outlook or another email client. Headers should be formatted like "X-someheadername: value"
- Reroute message to another email address - Forwards the message to another email address instead of this one.

## Content Filter Types

- From Address
  - From specific addresses
  - From specific domains
  - Contains Specific Words or Phrases
- Subject
- Body Text
- Subject or Body Text
- From Address
  - To Address
  - Email Headers
  - 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 is Automated (no return address)
- Message under Size
- Message over Size
- Received in Date Range
- Sent through a Specific Server (by IP)
- Spam Probability

## Folder Auto-Clean

Folder Auto-Clean is a method for limiting how much of your account disk space is used by the Junk E-Mail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, you can help ensure that your account does not fill up unnecessarily. Oldest messages will be deleted from the folders first.

Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

Note: If auto-clean is active on a folder, messages will get deleted from it eventually, so do not keep messages in that folder if you want to keep them.

Use default auto-clean settings - Choosing this option will let you adopt the policy of your email host or domain administrator. If the administrator changes the policy, yours will automatically change with it.

Override auto-clean settings for this account - Choose this option to override the settings. Any changes you make will not be affected if the administrator changes the policy, unless they disable user overrides.

## Folder Settings

The following options appear once for each folder that can be auto-cleaned.

Enable auto-clean for this folder - If this box is checked, then auto-clean will be active for the specified folder.

Folder size BEFORE auto-clean - Once the folder reaches this size (in megabytes), the auto-clean process is started, and older messages are cleaned.

Folder size AFTER auto-clean - This is the goal size for the auto-clean process. It will try to delete older messages until the folder gets to this size. This number should always be lower than the "before" number.

## My Spam Filtering

SmarterMail includes many advanced Anti-Spam measures that will help keep your inbox free of unwanted junk mail. Your domain administrator has probably already set up some basic spam options. To customize the way junk e-mail is processed for your account, go to Settings -> My Spam Filtering.

Use default spam settings - Choose this option to accept the default spam options provided by your domain administrator. The settings will be displayed for your reference.

Override spam settings for this account - Select this option to customize the way spam is handled, and to override the settings created by the domain administrator. More information about the types of actions allowed can be found below .

Trusted Senders - Email addresses (ex: joe@example.com) or domain names (ex: example.com) can be added to your list of trusted senders. When email comes in from a trusted sender, all spam filtering for that email is bypassed. Enter one email address or domain name per line.

## Overriding Settings

When you choose to override the spam options set by your domain administrator, you get to choose the actions that are taken when email comes in that has a low, medium, or high priority of being spam. For each spam level, choose the action you wish to take. If you chose to add text to the subject line of messages, enter in the text in the box below the action drop down.

When all settings are entered, click on the Save link.

## Logging in to SmarterMail

You will need to obtain the link to your SmarterMail server's web site from your Administrator or Domain Administrator.

A screenshot of the SmarterMail login interface. The window title is "Please log in to SmarterMail...". It contains four input fields: "Full email address (ex. user@domain.com)" with "user@domain.com" entered; "Password" with masked characters; "Language" with a dropdown menu set to "Use Browser Language"; and a "Remember me" checkbox which is unchecked. At the bottom, there are "Login" and "Help" buttons with icons.

To login to SmarterMail, type in your full email address and Password on the login screen. If everything matches up, you will be presented with the welcome page and a view of all folders in your mailbox. The full original email address (not an alias address) must be used to log into the corresponding mailbox

One thing to notice on the Login page is the "Remember Me" checkbox. By checking this box SmarterMail encrypts your login and password, then you can close the browser window and not have to re-log in when you return. This function works as long as you do not "log out" of SmarterMail prior to closing your browser window. If you do log out, you will have to log back in upon your return, regardless of whether the "Remember Me" box was checked or not. You will need cookies enabled on your browser for this feature to work.

A standard User is able to view all email folders (inbox, sent, and Custom) for their designated account. Users with end users with admin permissions for the domain privileges are usually the owner of a domain who can add/remove users and change domain settings.

## Frequently Asked Questions - Email Users

- General
  - I lost my password. What should I do?
  - How can I ensure that mass mailings are sent out faster?
  - WebMail

- Why are my deleted messages only showing up as crossed out and not being moved to my Deleted Items folder?
- I am unable to log in using my username. What do I do?

## General

I lost my password. What should I do? Contact your hosting company or email administrator to have your password changed. Please do not contact SmarterTools directly, as we have no access to retrieve your password.

How can I ensure that mass mailings are sent out faster? Sending the same message to fifty or more recipients can slow the delivery process. To ensure a speedy delivery, with mass mailings containing more than fifty recipients, send the same message to fifty or less addresses at once.

## WebMail

Why are my deleted messages only showing up as crossed out and not being moved to my Deleted Items folder? There is an option for end users to choose what action deleted items take. When deleted items are crossed out (to symbolize deletion) then you have the 'Mark as Deleted' option chosen. If you want the messages to move to a deleted items folder upon deletion, you can select the 'Move to Deleted Items Folder' option in your Config/My Settings page.

I am unable to log in using my username. What do I do? First, ensure that you are using your entire email address (ex. name@example.com) in the web interface to log in to SmarterMail. Second, make sure that your CAPS-LOCK is disabled, as passwords in SmarterMail are case-sensitive. If those options fail, please contact your hosting company or email administrator to have your password changed.

## [Help for Domain Admins](#)

### [Reports](#)

#### **Domain Disk Space Report**

Disk space is sometimes limited for domains. The Domain Disk Space Report will help you identify those users who are using the most disk space. This is especially important in hosted scenarios, when billing may depend upon not exceeding disk space limits. This report always shows data for the time the report was run.

Note: This report may or may not be enabled for your domain, depending on the selections made by the system administrator.

Sort By - Choose a method to sort the data.

Generate Report - Click this button to calculate and show the report

#### **Results**

Once generated, the report will show the following items:

- Username - The account that is storing the email
- Space Used - The disk space used in kilobytes

Note: Sometimes users may choose to hide their deleted items. If this is the case, it may not be immediately apparent where the space is being used. When logged in as the user, go to Manage Folders to see where the disk space is being used.

#### **Domain Bandwidth Report**

The Domain Bandwidth Report will assist you in identifying those users that are using too much bandwidth. This is especially important in hosted scenarios, when billing may depend upon not exceeding bandwidth limits.

Note: This report may or may not be enabled for your domain, depending on the selections made by the system administrator.

Start / End Date - Choose the date range on which you wish to report. The dates are inclusive.

Sort By - Choose a method to sort the data.

Generate Report - Click this button to calculate and show the report

## Results

Once generated, the report will show the following items:

- Username / Email Address - The account that received or sent messages
- Bytes Received - The bandwidth in kilobytes accumulated from incoming email messages, regardless of content filtering.
- Bytes Sent - The bandwidth accumulated from outgoing messages, including auto-responders.
- Messages Received - A count of all incoming messages, regardless of content filtering.
- Messages Sent - the number of outgoing messages, including auto-responders.

Notes:

- If you see "Other Addresses" appear in your stats, it indicates messages sent to or from a catch-all account.
- Email address that come in through aliases then forwarded to a local user will not show up as incoming for that user, but rather as incoming under the Alias Statistics.
- Email accounts with forwarding will show the forwarded mails as Sent Messages.

## Settings

### Email Accounts

There are two types of email accounts in SmarterMail: Users and Aliases. Both of these are explained in this topic.

Users - An email user account represents a person's actual mailbox. User accounts can receive email, send email, and log in to the web mail interface.

Aliases - A user alias represents a forward to an actual email account. The sole purpose of a user alias is to forward email to other accounts. Aliases may not send mail, and may not log into the web mail.

### Managing Accounts

As a domain administrator, you can manage email accounts from the Email Accounts page in the Settings menu.

Add User - Clicking this button will let you add a new email user. More information about adding user accounts can be found in the topic Adding a User Account .

**Add Alias** - Similarly to adding a user, clicking this button will allow you to add a new user alias. More information about adding user accounts can be found in the topic [Adding a User Alias](#) .

**Set Catch-All** - A Catch-all is a special option set for a single alias. The alias assigned the catch-all will receive all email for a domain that is not targeted to an existing user or alias. Using a catch-all is usually not advised, as it gives spammers the idea that the email addresses are valid, and you may receive more spam as a result.

**Edit an account** - Edit an account by clicking on the username of the account in the table

**Deleting an account** - To delete an account, click on the delete link next to the account's name. Note: Deletions are permanent, and once an account is deleted, the mail cannot be retrieved from it.

## Adding a User Account

To begin adding a user account, click on **Add User** from the **Email Accounts** page. When you do so, you will be presented with a page that contains the items below. When the items are set to the values you want, click on the **Save** button to finish adding the user.

**Note:** Many of these values, especially those in **Display Settings** and **Compose Settings**, can be left at the defaults when adding a new user account, as they are better set by the user. They are included in the **Add User** page so you may edit them if you wish, however.

### User Information

**Username** - The email address (e.g. "user" in user@domain.com).

**Full Name** - Enter the name of the person using the email account.

**Disable this user** - This will completely disable this user, but the account is not deleted. The user will not be able to log in, send or receive email for this account until you reactivate it.

**Domain administrator** - If this option is checked, the user will have full domain administrator privileges, including the ability to add and edit users.

**Mailbox size** - This box allows you to set the maximum mailbox size for the account you are adding.

**Reply-to address** - Enter an alternate reply address you wish to use. This will be the default reply to address for mail sent from this account.

**Forwarding address** - Enter an address to forward every inbound email message to. For example, if your mobile phone has an email account and you will be away from your computer for a few days, enter the mobile phone's email address here to forward email to it. You can only forward to a single email address. If you need to send to multiple addresses, you must use an alias.

Forwarding exclusions - If you wish to limit what emails are sent as forwards, you may choose to do so with this option to avoid forwarding spam.

Delete message on forward - Check this box to delete the message from the inbox of the original email account after forwarding it to another email address.

Signature - Add text to this area for a 'signature' that will display at the bottom of each email message that is composed in the web interface.

## Password

New password - Enter a password for the email account

Confirm password - In order to ensure you typed the new password correctly, enter it again in this space

Lock password - This option 'locks' the password for end users. If this option is checked the user will not be able to change their password.

## Display Settings

Sort messages by - When viewing messages in a folder, they will be sorted in the order chosen in this field. By default, messages are sorted by date in descending order.

Sort folders by - When viewing the manage folders page, folders will be sorted in this order.

Messages per page - When viewing the messages in a folder, this option lets you customize how many emails will appear per page.

Message list refresh rate - If this box has something besides Never chosen, the page that shows messages in a folder will automatically refresh after the chosen number of minutes.

Display messages as - While a user can choose to view a message in plain text or HTML while reading it, this option will allow you to choose the default viewing method.

- Plain Text - This option will only display text. While it is less interesting (no fonts, images, etc), it is also much more secure and is faster to view than HTML.
- HTML - This option will display HTML content if present in the email. This content can include stylistic elements, like fonts or colors, as well as hyperlinks and other formatting elements.

When messages are deleted - Choose what happens to messages when they are deleted. The options are outlined below. For more information about deleted items, refer to the topic [Deleting Messages](#) .

- Move to deleted items folder - Deleted items will appear in the deleted items folder, which will need to regularly be emptied manually
- Delete message and purge folder - Remove the message and get rid of any other email messages that are marked for deletion
- Mark as deleted - Does not actually delete the message. Flags the message for deletion, and it will not get removed until the folder is purged
- Mark as deleted and hide - Does the same thing as "Mark as deleted" above. 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

Enable hover bar in tables - In some browsers, the hover bar may take up too many resources.

Disabling this option will still allow the user to click on rows to edit items and view email, but will not show the hover bar.

## Compose Settings

Spell check dictionary - Choose from any of the dictionaries that the administrator has installed on the server

Compose messages as - Choose the method of email composing that the user is to use.

- Plain Text - Use this for a simple method of email editing. The user will not be able to change colors or fonts, but the emails will generally be much smaller and readable on more email clients
- HTML - Use this option if you wish to add stylistic elements to your user's emails

Compose window size - Choose the edit window size from this drop down that best works with the user's browser. Recommended is small for resolutions smaller than or equal to 800x600, medium for 1024x768, and large for resolutions equal to or higher than 1280x1024.

Forwarding method - There are several methods by which a message can be forwarded. Please see the list below to understand each of them.

- Normal - Includes original content, including font styles from original message, as part of the new message
- Plain text only - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links or fonts.
- Embed as attachment - Attaches the original message to the new one. The message will not appear in the body of your message.

Reply header type - Choose whether to include a shortened basic header in email replies, or the full header instead. For most users, basic headers will be sufficient.

Reply indicator - If your compose method is plain text, this character will get added to each line of the original message in order to distinguish it.

Include previous replies in reply - If checked, the message you are replying to will get embedded in the new message.

Save copy of replies in Sent Items folder - If checked, all messages you send from the web interface will get saved in the Sent Items folder. If the user send many messages, they may need to regularly delete items from the sent items folder.

## Adding a User Alias

A user alias is an email address that forwards messages to a list of email addresses. Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address since no email is ever actually stored for the alias. Emails are just sent to the list of addresses provided for the alias. For example, in a working environment with multiple email addresses, the office may want to make a central email address that distributes messages to all personnel. The alias `workplace@example.com` can be made for messages to be sent and then distributed to all of the employees.

To begin adding a user alias, click on Add Alias from the Email Accounts page. After you fill out the fields on the page, click on Save to finish adding the alias.

Alias Name - Enter the name of the alias

Emails - Enter the full email addresses of the users to which this email should direct incoming mail.

Note: For more information on using the alias as a catch-all, see the topic Using a Catch-All .

## Mailing Lists

Mailing lists are a good way to send a message or series of messages to many people at once. Some people use mailing lists for newsletters, while others use them for product updates or discussion groups. A mailing list is similar to a user alias, but has much more functionality. Some advantages of mailing lists are shown below.

- Subscribers can enroll or remove themselves from the list automatically through email list serv commands

- You can restrict the email addresses that are allowed to post to the list
- You can automatically add headers and footers to emails sent to the list
- Digest mode is available, which will send those subscribers summaries of all list emails for a period of time in a single message

For more information about Mailing Lists, see the help topics in the Mailing Lists (List Serv) section.

Note: You may or may not see the mailing list options depending on the settings made by your administrator.

## Domain Aliases

A Domain Alias is an alias for a secondary domain name that points to an existing email account on the server under an existing primary domain name.

For example, a full email addresses requires a user name and a domain name (ex. `user@example.com`). If you add a domain alias on a secondary domain like "example-alias.com" then not only will "user@example.com" be valid, but the same mailbox will also work with "user@example-alias.com". If an email was sent to both emails then the "user" mailbox would get two copies of the emails.

A user cannot log into the web interface under a domain alias, just the original domain, nor can a user send an email from the domain alias. Remember, any alias is simply a pointer to an existing email account on the server.

Notes:

- Messages can not be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.
- The mail exchange (MX) record for the domain being added must already be pointing at the server prior to this process. This prevents users from 'hijacking' mail from valid domains. For example if this check were not in place a user could add a domain alias of example.com. Then, any mail sent from the server to "anything@example.com" would go to the domain with the example.com domain alias, rather than to the actual domain.

## Domain Content Filtering

Domain content filtering allows you to create the same types of content filters as you can in My Content Filtering, but the filters added will be applied to all members of a domain. The evaluation of domain content filters happens before the evaluation of account-specific content filters.

For more information about how to add a content filter, please refer to the topic My Content Filtering .

Note: Be aware that many users will prefer to set their own content filtering. You may want to minimize filtering at the domain level to filter only items that affect the entire domain.

## Domain Spam Filtering

SmarterMail includes many advanced Anti-Spam measures that will help protect your users from unwanted email. The system administrator has probably already set up some default spam options which you may accept or override as you feel is best.

Use default spam settings - Choose this option to accept the default spam options provided by your system administrator. The settings will be displayed for your reference.

Override spam settings for this domain - Select this option to customize the way spam is handled. Spam check weights and actions will become overridable. More information about the types of actions allowed can be found below.

### Spam check 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.

### SPF Filtering Options

Pass - 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 - 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 - 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 - 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 - Indicates that the email sender does not publish an SPF record or there is a syntax error in the 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 popular on the internet.

## Actions

When you choose to override the spam options set by your system administrator, you get to choose the actions that are taken when email comes in that has a low, medium, or high priority of being spam. For each spam level, choose the action you wish to have taken. If you chose to add text to the subject line of messages, enter in the text in the box below the action drop down.

Trusted Senders - Email addresses (ex: joe@example.com) or domain names (ex: example.com) can be added to the domain list of trusted senders. When email comes in from a trusted sender, all spam filtering for that email is bypassed. Enter one email address or domain name per line.

When all settings are entered, click on the Save link.

## Mailing Lists (List Serv)

### Digest Mode

#### Digest Overview

Digest mode is another method of receiving posts to a mailing list that reduces the number of emails that get received. Subscribers to your list may choose digest mode rather than normal mode if they would prefer to get summary emails of the list conversations rather than an email for each post.

Note: Digest mode for a list must be enabled before it will function. It can be enabled in General Settings .

Digests can be configured in such a way that they send when a certain amount of time has passed, or when certain thresholds are met (number of posts or combined size of the posts, for example). For more information regarding digest settings, please see one of the topics below.

- Digest Settings
- Digest Subscribers
- Digest Header, Footer, and Separator

### Digest Settings

The Digest Settings page allows you to modify how digest mode works for your mailing list. Before digest mode will function, it must be enabled in the General Settings page.

List Name - For reference, shows the name of the mailing list

**Current Digest Size** - The current size of the next email to be sent. This value will grow the more emails that get posted to the list. When a digest is sent, the number resets to 0 (zero) KB.

**Last Sent** - The date fo the last digest email sent

**Subject** - Enter a subject for all digest emails. This subject should represent the context of the list.

**Send Trigger Type** - Choose what type of event triggers the digest to be sent. If more information is required, it will be asked below the trigger type.

**Send Now** - Click on this button to send out the current digest regardless of the trigger

**Strip non-text attachments from digest** - Digests can be much larger than standard lists, for this reason you may want to minimize the actual sending size of the digest by removing non-text attachments.

**Enable header, separator, footer** - These will not be shown unless the options are checked.

## Digest Subscribers

Digest subscribers are those email addresses that will receive list posts in digest format, rather than receiving all emails as they get posted to the list. To modify the digest subscribers for a mailing list, choose Digest Subscribers from the manage drop-down menu in the Mailing Lists page.

You will see a page that shows all of the email addresses of people who have subscribed to your list in digest mode. Keep in mind that digest mode has a different subscriber list, so if people want to receive posts in the normal format, you'll need to enter them in Subscribers .

**Add Addresses** - Click on this button to add one or many email addresses to the list. Ensure that you enter one email address per line when adding them. Duplicates will not be added.

**Download** - This button will initiate the download of a .txt file that contains all subscribers to your mailing list.

**Upload** - Click on this button to upload a new .txt file containing list subscribers (one per line). Choose whether you wish to append the uploaded contents to the existing list, or whether you wish to completely replace the list with the new one. Browse to the file and click OK to upload and process the list. Duplicates will not be added.

**Delete All** - Deletes all email accounts in the list. A confirmation dialog will appear. Once you have deleted subscribers, it is not possible to get them back, so it is recommended that you first download the list before deleting the users.

**Delete Link** - Click on the delete link next to an email to remove it from the list

## Digest Header, Footer, and Separator

Mailing List emails to digest subscribers are grouped together so that multiple emails are combined into one digest email. In order for headers and such to function, they must be enabled in the Digest Settings page for the list. The digest email is formatted as shown below.

```
DIGEST HEADER  Email 1 DIGEST SEPARATOR  Email 2 DIGEST SEPARATOR  . . . DIGEST
SEPARATOR  Email n DIGEST FOOTER
```

To edit the digest header, footer, or separator, choose the corresponding option from the manage pop-up menu on the Mailing Lists page.

## Mailing List Overview

Mailing lists are a good way to send a message or series of messages to many people at once. Some people use mailing lists for newsletters, while others use them for product updates or discussion groups. A mailing list is similar to a user alias, but has much more functionality.

To manage the mailing lists for your domain, click on the Settings menu and choose Mailing Lists. This will take you to a page that lists all of the mailing lists in the domain.

Adding a List - Click on the New List button to add a new mailing list. This will show the Mailing List General Settings page. More information can be obtained here .

Editing a List - To edit the general settings of a mailing list, click on the name of the list.

List Name - The name of the mailing list.

Description - The description that was entered for the mailing list

Moderator - The user responsible for the list

Manage Link - Click on this link to pop up a menu that allows you to manage specific settings for the list. These are explained in more detail below.

- General Settings - This item has the same effect as clicking on the list name. It will allow you to edit the general settings of a list. [more info](#)
- Subscribers - Subscribers are those email addresses that will receive copies of every email posted to the list. [more info](#)
- Poster Whitelist - Email addresses entered into the poster whitelist may post to the list in addition to those defined in General Settings. [more info](#)
- Poster Blacklist - Email addresses in the poster blacklist will not be permitted to post to the list. [more info](#)

- Header - The text entered for the header will be added to the top of all emails to the list. [more info](#)
- Footer - The text entered for the footer will appear at the bottom of all emails to the list. [more info](#)
- Subscribe File - The contents of the subscribe file are sent to new subscribers. [more info](#)
- Help File - When a command is sent to the list serv command address, and it is formatted incorrectly, or when an email is sent to the list that is not permitted, the help file is sent to the user. [more info](#)
- Digest Settings -
- Digest Subscribers -
- Digest Header -
- Digest Separator -
- Digest Footer -

Delete Link - Click on this link to delete the corresponding list. A confirmation page will appear.

Note: Once a list is deleted, it is not recoverable.

## General Settings

The general settings for a mailing list contain the information that establishes how the list functions. Information about the items on this page can be found below.

### List Settings

List name - This is the name of the list and the email address to which and from which emails will be sent.

Description - For ease in identification, you may add a description to the list.

List moderator - This is the "owner" of the list. The moderator must be a user in your domain.

List password - Posting on a list can also be restricted by requiring a password. To post to a list that is password protected you must send the password in the subject enclosed by brackets and colons (e.g. Subject: [:password:] Attention all subscribers).

Who can post? - An email that is sent to the list, and therefore re-sent to the list subscribers, is considered to be "posted". In this field you can determine who has access to post to the list. In addition to the selected post option, you can enable the posters list, which can further permit or deny users.

- Anyone - Setting the list to "anyone" means that when anyone, regardless of whether they are subscribed to the list or not, sends an email to the list, it will be sent out to all members. This setting can cause abuse if it is not closely monitored.

- **Subscribers Only** - Setting the list to "subscribers only" allows the list subscribers, and only the list subscribers, to send and receive posts. The moderator will still be permitted to post.
- **Moderators Only** - If the moderator is set as the post option, only the moderator will be able to post to the list. This means that no one else, not even list subscribers, will be able to post.

**Subject prefix** - All list posts will get this text put on the subject line before the actual subject. It is recommended most for discussion lists, so that people can filter posts more easily.

**Max message size** - The maximum permitted size of a message (in kilobytes). If the message exceeds this size, it will not be posted. If you do not wish to set a size limit, enter 0 (zero).

**Max recipients / message** - This setting is used to set the number of recipients per message that will be sent. For example, if there were 500 subscribers to a list, and the max recipients value was 100, 5 emails would be sent (each with 100 recipients). Changing this settings can affect the load on the server.

## List Options

**Reply to list** - When this option is checked, replies from a subscriber go to the list. If this option is off, the reply goes to the person who posted the original message on the list.

**Enable LIST command** - This option enables the ability for a user to send an email to the list command address and receive a reply of all list users. The use of this command is detailed in the topic [List Serv Commands](#) . Note: It is recommended that you leave this option disabled, as people or automated systems could use the user list for malicious purposes.

**Enable SUBSCRIBE command** - This enables the subscribe command that allows people to subscribe to the list by sending the command to the list command address. Leave this box unchecked if you wish to have control over your list subscribers, and then only list administrators will be able to modify the subscribers. The use of this command is detailed in the topic [List Serv Commands](#) .

**Enable digest mode** - This enables digest mode. When using digest, the server stores all posts to the list in a set folder. When the 'trigger' is set off, all accumulated posts are sent out as a single message. For more information about digest mode, see the topic [Digest Overview](#) .

**Enable header** - When enabled, the header you define in [Header](#) will be placed at the top of each email.

**Enable footer** - When enabled, the footer you define in [Footer](#) will be placed at the bottom of each email.

**Enable poster whitelist** - Anyone added to the [Poster Whitelist](#) will be able to post if this option is enabled. The [Poster Blacklist](#) is always enabled.

Allow unsubscribe from subject - Enabling this option will allow a subscriber to unsubscribe from your list by replying to the list with unsubscribe in the subject line. It is recommended that you usually keep this option enabled, as it will reduce complaints of abuse, as subscribers can quickly opt-out of the list.

## Subscribers

Subscribers are those email addresses that will receive list posts. To modify the subscribers for a mailing list, choose Subscribers from the manage drop-down menu.

You will see a page that shows all of the email addresses of people who have subscribed to your list. Keep in mind that digest mode has a different subscriber list, so if people want to receive posts in digest format, you'll need to enter them in Digest Subscribers .

Add Addresses - Click on this button to add one or many email addresses to the list. Ensure that you enter one email address per line when adding them. Duplicates will not be added.

Download - This button will initiate the download of a .txt file that contains all subscribers to your mailing list.

Upload - Click on this button to upload a new .txt file containing list subscribers (one per line). Choose whether you wish to append the uploaded contents to the existing list, or whether you wish to completely replace the list with the new one. Browse to the file and click OK to upload and process the list. Duplicates will not be added.

Delete All - Deletes all email accounts in the list. A confirmation dialog will appear. Once you have deleted subscribers, it is not possible to get them back, so it is recommended that you first download the list before deleting the users.

Delete Link - Click on the delete link next to an email to remove it from the list

## Poster Whitelist and Blacklist

The poster whitelist and blacklist allow you to have control over which subscribers are allowed to post messages to the list.

Use the whitelist to set the email accounts for people who are permitted to post to the list. This list is added to the email accounts that fall under the "who can post?" option that is set in General Settings . In addition, this list will not be used unless you enable the "enable poster whitelist" option in General Settings.

Use the blacklist to block specific subscribers from posting to your list. This list is always active, and is a good way of preventing those that have sent questionable content from doing so again.

The poster whitelist and blacklist pages function the same as the subscriber list page.

**Add Addresses** - Click on this button to add one or more email addresses to the list. Ensure that you enter one email address per line when adding them. Duplicates will not be added.

**Download** - This button will initiate the download of a .txt file that contains all emails for subscribers to the list.

**Upload** - Click on this button to upload a new .txt file containing email addresses (one per line). Choose whether you wish to append the uploaded contents to the existing list, or whether you wish to replace the list with the new one completely. Browse to the file and click OK to upload and process the list. Duplicates will not be added.

**Delete All** - Deletes all email accounts in the list. A confirmation dialog will appear. Once you have deleted the list, it is not possible to get it back, so it is recommended that you first download the list before deleting the emails.

**Delete Link** - Click on the delete link next to an email address to remove it from the list

## Headers and Footers

Headers and footers can be added to each post made to the list. This can be useful for introducing your mailing list, showing contact information, or providing removal instructions. Headers are placed at the top of posts, and footers are placed at the bottom of posts.

To edit a list's header or footer, choose the Header or Footer item from the manage pop-up menu on the Mailing Lists page. You will also need to enable the header or footer on the General Settings page.

**Note:** The Header and Footer are not added for digest mode subscribers. To modify those, see the topic [Digest Headers and Footers](#) .

## Subscribe File

The subscribe file is the email that is sent when a person subscribes themselves to your list. When the subscription is processed, the email is sent to their email account. Often this email is used to confirm to the person that their email was subscribed, welcome the person to the list, and summarize the rules for proper conduct when posting.

To edit the subscribe file, choose **Subscribe File** from the manage pop-up menu on the Mailing Lists page.

## Help File

The help file is emailed to a person if they fail to subscribe properly or they do not post messages that conform to the policies of the list. By default, the help file contains the list of appropriate commands that the person can use with the list.

To edit the help file, choose Help File from the manage pop-up menu on the Mailing Lists page.

## List Serv Commands

List Serv Commands allow you to control the list through commands sent in email messages to the List Serv Command Address. By default, the command address for a domain is "STServ@example.com", where example is the name of your domain. Your server administrator may change this command address for you.

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 - Replies to the email with basic instructions on using List Serv Commands.

Help listname - Replies to the email with the contents of the Help File 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. This command can be disabled by the moderator in General Settings .

Subscribe listname - Adds your email address to the subscribers list of the mailing list. This command may be disabled for private lists by the moderator in General Settings .

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.

## [Additional Help Topics](#)

### **Using a Catch-All**

A catch-all alias can be established that can receive all incoming email that goes to invalid email addresses within your domain. You may want to do this, for example, if customers frequently send to accounts that do not really exist.

To set a catch-all alias, first create an alias in your domain to be the catch-all. Then go to the Email Accounts page and choose Set Catch-All . Choose the alias you wish to use as the catch-all, and click on Save .

Note: It is important to never set an auto-responder on an email account that the catch-all forwards to, as it may result in spammers sending more email to your domain. In addition, additional bandwidth usage will result.

## [Help for System Admins](#)

### [Installation](#)

#### [Getting Started](#)

The setup of SmarterMail is intended to be a relatively painless experience. Follow the steps below to get your server up and running.

- Installing SmarterMail
- Setup under IIS (optional)
- Log in as the Administrator
- Activate SmarterMail
- Change the Administrator Password
- Add an Email Domain to SmarterMail
- Configure DNS for the Domain

#### [Installing SmarterMail](#)

SmarterMail comes as a single installation file that contains everything necessary to run the product. The SmarterMail installer can be downloaded from [www.smartertools.com](http://www.smartertools.com). The free version and the licensed version of SmarterMail are both contained within this installation file, so it will not be necessary to download or install the file again if you purchase a license after trying the free version.

Note: Users of Windows 2003 Advanced Server need to install SmarterMail from Add/Remove Programs in the control panel in order for file permissions to be properly set.

	Run the installer, and choose a location to install the files.
--	--

#### [Setup IIS \(optional\)](#)

SmarterMail comes equipped with a web server that allows those that do not have IIS to use the webmail. SmarterTools recommends using IIS if you have it, however, as it is more capable than the included web server. If your computer is equipped with IIS 5.0 or later, follow the instructions in the topic [Running as an IIS Site](#).

	If you have IIS 5.0 or later, convert the web interface to run under IIS.
--	---

## Log in as the Administrator

NOTE: The shortcut placed on your desktop when you install the software will automatically log you in as the system administrator, but only until you change the URL of the interface or the system administrator login. After that, you will need to update the shortcut.

All administration of SmarterMail is performed through the web interface. There are three different levels of user that determine what can be seen when using the web interface:

- System Administrator - This account lets you manage all facets of your mail server
- Domain Administrator - Every domain added to SmarterMail needs to have a domain administrator that is in charge of the domain. This offloads the responsibility of managing users and domain-specific settings from the System Administrator.
- Email User - This level of access is for people who are logging in to view their webmail.

	Use your browser to navigate to <a href="http://127.0.0.1:9998">http://127.0.0.1:9998</a> . If you have converted SmarterMail to run with IIS, browse to the URL you chose when adding the IIS web site.
--	--

	Use " admin " for the email address field, and " admin " for the password field (without the quotes). If you have changed the system administrator's username or password, you should use those values instead.
--	---

## Activate SmarterMail

Upon logging in as the administrator for the first time, you will be presented with the activation wizard. Which option you choose depends on whether you have a license key, or whether you wish to use the free version of SmarterMail. Please refer to the help topic Activating SmarterMail for more information on this process.

	Activate SmarterMail.
--	-----------------------

## Change the Administrator Password

The most important step in locking down the security of your mail server is changing the System Administrator username and password. Once you change the username and password, you will need to remember the values you used, so either write them down, or use information you can remember.

Also, bear in mind that the password is case-sensitive. To change the login, follow the steps below:

	From the Settings menu at the top of the page, choose General Settings.
--	---

	Enter a new system administrator username and password into the fields in the Security section.
--	---

	Write down the username and password and store it in a secure location.
--	---

	Click on the Save button to save your changes to the system.
--	--

## Add an Email Domain to SmarterMail

Detailed instructions for adding a domain can be found in the topic [Adding a Domain](#) .

	From the Manage menu at the top of the page, choose Add Domain.
--	---

	Add a domain to SmarterMail, noting it's IP address for the DNS changes below.
--	--

## Configure DNS for the Domain

There are three major things to set up on your DNS server for each site you add to SmarterMail. How you set these up is dependant on who hosts your DNS, and what DNS software is used. Check your DNS server documentation for instructions on how to set up the following records (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.

	<p>WebMail URL - Add an A or CNAME record for mail.example.com that points to the IP address of the webmail interface. This will allow users of that domain to access the webmail by typing in http://mail.example.com or http://mail.example.com:9998 in their web browser (depending on whether you use the included web server or IIS).</p>
--	--

	<p>Mail Pointer - Add an MX record for example.com that points to the IP address that you assigned when adding the domain to SmarterMail. This will allow other email servers to locate your mail server.</p>
--	---

	<p>Reverse DNS Record - Add a reverse DNS record for 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.</p>
--	--

## Running Web Interface Under IIS

By default, SmarterMail will install a basic web server that allows you to start using SmarterMail immediately after installation. However, it is recommended that you move SmarterMail to a more

robust and secure web server, such as Microsoft's Internet Information Server (IIS). To configure SmarterMail to run under IIS 5.0 or higher, follow the step-by-step instructions below.

This section explains how to setup SmarterMail as its own IIS site (recommended method). If you wish to run SmarterMail as a virtual directory under an existing IIS site, [click here](#).

Note: This topic assumes that you are familiar with IIS and how it works. SmarterTools recommends that you use the web server included with SmarterMail if you do not feel comfortable using IIS.

Note: Several steps that were necessary under SmarterMail 1.x are no longer necessary, and thus have been removed from this topic.

### Install IIS (if necessary)

	Click on Start -> Control Panel -> Add Remove Programs
--	--

	Click on Add / Remove Windows Components.
--	---

	Check the box for Internet Information Services (IIS).
--	--

	Complete the Wizard and wait for the installation to complete.
--	--

	<p>If Microsoft.Net mappings are not correct (for example, if you install IIS after Microsoft.Net), run the following at the command prompt (replace "\Windows\" with "\WinNT\" for Windows 2000 installations):</p> <ul style="list-style-type: none"> <li>• c:</li> <li>• cd</li> <li>  \Windows\Microsoft.Net\Framework\v1.1.4322</li> <li>• aspnet_regiis -i</li> </ul>
--	---

## Disable the SmarterMail Web Server

While not absolutely necessary, this step will improve security on your server and is highly encouraged.

These steps will stop and disable the Web Server included with SmarterMail. They will also have the side-effect of disabling the shortcut to SmarterMail on your desktop until you update it with the new URL for SmarterMail.

	Click on Start -> Program Files -> SmarterTools -> SmarterMail -> Configure SmarterMail Web Server
--	--

	Click on the Stop button
--	--------------------------

	Change the Startup Mode to Disabled and click on the Apply button
--	---

	Click on the Close button
--	---------------------------

## Add SmarterMail to IIS

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
--	--

	Right-click on the web sites tree on the left of the page and choose New -> Web Site
--	--

	When asked for a description, enter SmarterMail
	Choose the IP address to use for webmail. If this IP address is shared with another web site, you will need to use a different port or Host Headers. For more information about using Host Headers, refer to the IIS documentation.
	For Path, use "C:\Program Files\SmarterTools\SmarterMail\MRS" (or use the location in which you installed SmarterMail).
	Leave the "Allow anonymous access to this web site" box checked.
	When asked what permissions to grant, choose only Read and Run Scripts.
	Finish the wizard
	Open the web site tree for the new IIS site and right click on the mailprocessing directory. Choose Properties from the pull-down menu.
	In the Execute Permissions dropdown box, choose "None"

	Click on OK to save the settings
--	----------------------------------

## Verify IIS Settings

	If you are using Windows 2003, verify that the ASP.NET v1.1.4322 Web Service Extension is set to Allowed in IIS. If you do not see ASP.NET under Web Service Extensions, ensure that ASP.NET is enabled in the Application Server. (Control Panel -> Add / Remove Programs -> Windows Components -> Application Server -> Details)
--	--

	Ensure that the default document for the site is Default.aspx (under the Documents tab)
--	---

## Update DNS

	If any domains are already setup with SmarterMail, make sure to update their webmail DNS records to point to the new IP address.
--	--

## Test the Site

	Open up a web browser, and type in the IP address of the site you just added.
--	---

[Return to Getting Started](#)

## Running Web Interface Under an Existing IIS Site

By default, SmarterMail will install a basic web server that allows you to start using SmarterMail immediately after installation. However, it is recommended that you move SmarterMail to a more robust and secure web server, such as Microsoft's Internet Information Server (IIS). To configure SmarterMail to run under an existing web site in IIS 5.0 or higher, follow the step-by-step instructions below.

This section explains how to setup SmarterMail as a virtual directory under an existing IIS site. This is not the recommended method. While it will function properly, it is recommended that you set SmarterMail up as its own IIS site instead. To learn how to set SmarterMail up on its own IIS site, [click here](#).

Note: This topic assumes that you are familiar with IIS and how it works. SmarterTools recommends that you use the web server included with SmarterMail if you do not feel comfortable using IIS.

Note: Several steps that were necessary under SmarterMail 1.x are no longer necessary, and thus have been removed from this topic.

### Disable the SmarterMail Web Server

While not absolutely necessary, this step will improve security on your server. As a result, while not mandatory, this step is highly encouraged.

These steps will stop and disable the Web Server included with SmarterMail. They will also have the side-effect of disabling the shortcut to SmarterMail on your desktop until you update it with the new URL for SmarterMail.

	Click on Start -> Program Files -> SmarterTools -> SmarterMail -> Configure SmarterMail Web Server
--	--

	Click on the Stop button
--	--------------------------

	Change the Startup Mode to Disabled and click on the Apply button
--	---

	Click on the Close button
--	---------------------------

## Add SmarterMail to an IIS Site

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
--	--

	Open up the Web Sites tree and locate the site under which you want to place SmarterMail
--	--

	Right-click on the web site and choose New -> Virtual Directory
--	---

	When asked for an Alias, enter "SmarterMail", "Mail", or another name. This will be used in the URL to get to webmail, as in <a href="http://www.example.com/smartermail">http://www.example.com/smartermail</a> .
--	--

	For Path, use "C:\Program Files\SmarterTools\SmarterMail\MRS" (or use the location in which you installed SmarterMail).
--	---

	When asked what permissions to grant, choose only Read and Run Scripts.
--	---

	Finish the wizard
--	-------------------

	Open the web site tree for the new IIS site and right click on the mailprocessing directory. Choose Properties from the pull-down menu.
--	---

	In the Execute Permissions dropdown box, choose "None"
--	--

	Click on OK to save the settings
--	----------------------------------

### Verify IIS Settings

	If you are using Windows 2003, verify that the ASP.NET v1.1.4322 Web Service Extension is set to Allowed in IIS. If you do not see ASP.NET under Web Service Extensions, ensure that ASP.NET is enabled in the Application Server. (Control Panel -> Add / Remove Programs -> Windows Components -> Application Server -> Details)
--	--

	Ensure that the default document for the site is Default.aspx (under the Documents tab)
--	---

### Update DNS

	If any domains are already setup with SmarterMail, make sure to update their webmail DNS records to point to the new site.
--	--

## Test the Site

	Open up a web browser, and type in the URL of the virtual directory (ex. <a href="http://www.example.com/virtualdirectory">http://www.example.com/virtualdirectory</a> ).
--	---

## Activating SmarterMail

UPDATE: Activating an installation on this version requires manual activation. Please contact the SmarterTools Sales Department for assistance.

In order for SmarterMail to function, the product must be activated. If you move SmarterMail to another server, you may have to re-activate the product in order for it to work. To get to the product activation wizard, click on the Help menu and choose Activate Product.

If you have any difficulties activating SmarterMail, please contact SmarterTools support. Information can be found at [www.smartertools.com](http://www.smartertools.com).

### Select Activation Option

There are two types of activation modes in which SmarterMail can run. The Free Version mode allows up to ten users on a single domain. As the name states, the Free Version costs nothing. The License Key option allows you to enter a valid license key that has been purchased from SmarterTools. Limits to the number of domains or users that can be added depend on the license key that you purchase.

Choose which activation option you wish to use, then click on the Next button to continue.

### Activate Free Version

If you chose to activate the free version you will be presented with the screen above. The first step is to obtain an activation code. Click on the "Click here to get your free activation code" link and a web page will appear. Fill out the form, and your activation code will be emailed to you. Enter the activation code along with the email address you used on the form, and click on Activate Now to complete activation.

### Activate License Key

If you chose to activate a license key, you will be presented with the screen above. In order to complete this step, you will need a valid license key and password that were emailed to you when you obtained your license key. Enter in the information from the email into the boxes and click on Activate Now to complete the activation.

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.

[Return to Getting Started](#)

## Installation Checklist

This checklist highlights the important steps to get SmarterMail up and running. For more details on each item, click on the more info links.

	Run the installer, and choose a location to install the files. <a href="#">more info</a>
	If you have IIS 5.0 or later, convert the web interface to run under IIS. <a href="#">more info</a>
	Login to SmarterMail as the System Administrator. <a href="#">more info</a>
	Activate SmarterMail. <a href="#">more info</a>
	Change the System Administrator username and password. <a href="#">more info</a>
	Add a domain to SmarterMail. <a href="#">more info</a>
	Configure DNS settings for the domain. <a href="#">more info</a>

## Manage

### Managing Domains

A single, centralized page lets you do most of the management of your domains. Arrive at this screen by choosing Manage Domains from the Manage menu. The parts of this multi-use screen are described in detail below.

**Add Domain** - Click on Add Site to begin the Add Site Wizard. Clicking on this button is identical to choosing New Domain from the Manage menu at the top of the page. [more info](#)

**Edit Domain** - Click on a row to edit the site on that row. [more info](#)

**Login to Site** - Clicking on login to site will pop up a new window logged in to SmarterMail as if you are the domain administrator. This is useful for manipulating content filters or other settings. [more info](#)

**Manage** - Click on the manage link to show a pop-up menu. More information on each of the elements in the menu can be found below.

**Delete a Domain** - Click on the delete link next to a site to permanently delete it. A confirmation dialog will appear to ensure that a domain does not get accidentally deleted.

### Manage Pop-up Menu

When you click on the manage link next to a site, a pop-up menu will appear with various operations that can be performed for that specific site. Below, you will find an explanation of each of these menu items. For many of these actions, you will be logged in as the domain administrator in a new window in order to complete them.

**Email Accounts** - This choice lets you manage users and user aliases that map to email accounts in the domain. [more info](#)

**Domain Setup** - Clicking on this option has the same effect as clicking on a row. [more info](#)

**Reload Domain** - If there are any changes made to a domain outside of SmarterMail, reload the domain by clicking on this item

**Rename Domain** - This is the recommended method to rename a domain in SmarterMail. [more info](#)

**Mailing Lists** - Administrate mailing lists for the domain with this item. [more info](#)

**Domain Aliases** - Manage the domain aliases with this item. [more info](#)

Domain Spam Filtering - Click on this item to change the spam filtering options for the domain.

Domain Content Filtering - Clicking here will allow you to manipulate the domain level content filters for the site.

Domain Disk Space - Use this option to show the disk space report for the domain, which lists the users with the most disk space usage. [more info](#)

## Adding Domains

Add a domain by choosing New Domain from the Manage menu at the top of the page, or by clicking on Add Domain in the Manage Sites page.

Adding a domain is a four page process, with each page containing related items. After completing each page, click on the Next button. To go back to a previous step to correct something, click on the Back button. The site will not be saved until you click on the Save button on the final page.

Domain Name - Enter the full domain name of the site (ex. [smartertools.com](#)). This domain name must match one that is registered with a DNS server in order to send or receive email.

Domain IP - From the drop down list, choose the IP address on which the domain will listen for incoming requests. This setting does not affect the login to the web interface, only to the IP used to listen for SMTP, POP, and IMAP traffic. This IP address should match at least one MX record on your DNS server.

Disable Domain - Checking this box disables the domain. The domain will be unable to send or receive mail, and no users of the domain will be able to log into the web interface for this domain. This option is a good way to temporarily shut off a site without deleting it.

SMTP Port - Simple Mail Transfer Protocol (SMTP) uses a default port of 25. If you would like to use a different port for SMTP on your server, enter it in this box. It is not recommended that you change the default port unless you are behind a firewall that requires this setting to be changed.

SMTP Port (Alternate) - This box allows you to open up an alternate SMTP port. This is recommended if your email users access their email through ISPs that restrict the standard port 25, which is becoming more common. Users will be able to access their mail through either the SMTP port and the alternate SMTP port, as both will be available simultaneously.

POP Port - Post Office Protocol (POP3) uses a default port of 110. If you would like to use a different port for POP on your server, enter it in this box. It is not recommended that you change the default port unless you are behind a firewall that requires this setting to be changed.

IMAP Port - Internet Message Access Protocol (IMAP4) uses a default port of 143. If you would like to use a different port for IMAP on your server, enter it in this box. It is not recommended that you change the default port unless you are behind a firewall that requires this setting to be changed.

Require SMTP Authentication - Check this box if you want SMTP Authentication to be used the end users of this domain. Each user must then supply an email address and password in order to send email from their account. The authentication methods supported by SmarterMail are Cram-md5 and Login .

Bypass Forward Blacklist - Check this to allow forwards to any domain, thus bypassing any forwarding blacklist entries set at the system level.

Username - Enter the login name for the domain administrator (AKA "domain admin"). The domain administrator is usually the owner of the domain or the technical administrator. The domain administrator is responsible for adding and deleting email accounts, and setting specific configurations for the domain.

Password - Enter the domain administrator's password for SmarterMail

Full Name - Enter the full name of the domain administrator.

Important Note: The creation of a domain administrator account is required by SmarterMail for each domain on the server.

Domain Path - This is the path to the directory where all information pertaining to the domain resides (XML files, mail statistics, alias information, etc.). If the directory does not already exist, it will be created. This path should be under a directory solely dedicated to SmarterMail.

Mail List Command Address - This is the email address that List Serv commands can be sent to via email. more info

Max Domain Size - The total amount of space, in megabytes, that the Mail Server will allow the domain to use. Once this limit is reached, SmarterMail will refuse to accept any new mail for the domain. (Use 0 for no limit)

Max Users - The maximum number of user email accounts that can be added to this domain. (Use 0 for no limit)

Max Aliases - The maximum number of fake email accounts (forwarded to a true email account) that are allowed per domain. (Use 0 for no limit)

Max Domain Aliases - Enter the maximum amount of Domain Aliases allowed for this domain. (Use 0 for no limit)

Max Lists - Enter the maximum amount of mailing lists allowed for the domain. (Use 0 for no limit)

Max Recipients - Enter the number of email addresses a user can send a message to at one time. (Use 0 for no limit)

Max Message Size - Enter the maximum total size of an email in kilobytes that an end user can send at one time. This number includes text, html, images and attachments. (Use 0 for no limit)

Enable Domain Aliases - Check this box to show the "Domain Aliases" option in the Config menu for domain admins. This will allow domain admins to combine email addresses with different domain names into one mailbox (ex. joe@domain1.com and joe@domainalias.com). [more info](#)

Enable Mailing Lists - Check this box to show the "Mailing Lists" page in the Config menu for domain admins. This will allow domain admins to use the list serv features for sending emails via lists to many users. [more info](#)

Enable Domain Spam Options - Check this box to enable "Domain Spam Options" in the Config menu for the domain admin. Domain spam options are inherited by all users within the domain. [more info](#)

Enable Domain Content Filtering - Check this box to enable "Domain Content Filtering" in the Config menu for the domain admin. Content filtering is inherited by all end users within the domain. [more info](#)

Enable Domain Reports - Check this box to enable additional reports for domain administrators.

## Setup DNS for the Domain

In order for email to function properly, some DNS changes must be made on your DNS server. For details about what settings need to be added, please refer to the topic [Proper DNS Settings for Email](#) .

[Return to Getting Started](#)

## Editing Domains

Edit a domain by clicking on it in the Manage Sites page

Editing a domain is the same process as adding a new domain. It is a four part process, and no changes will be saved until you click on the save button.

Domain Name - This displays the name of the domain you are editing. To change the name of a domain, use the Rename Domain item in the manage pop-up menu. [more info](#)

Domain IP - From the drop down list, choose the IP address on which the domain will listen for incoming requests. This setting does not affect the login to the web interface, only to the IP used to listen for SMTP, POP, and IMAP traffic. This IP address should match at least one MX record on your DNS server.

**Disable Domain** - Checking this box disables the domain. The domain will be unable to send or receive mail, and no users of the domain will be able to log into the web interface for this domain. This option is a good way to temporarily shut off a site without deleting it.

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**Bypass Forward Blacklist** - Check this to allow forwards to any domain, thus bypassing any forwarding blacklist entries set at the system level.

**Use existing user** - If the domain administrator already belongs to the domain, choose his name from the drop down box and ensure that use existing user is selected

**Create new user** - Select this option if you wish to create another domain administrator account, in which case you'll need to fill out the fields below.

**Username** - Enter the login name for the domain administrator (AKA "domain admin"). The domain administrator is usually the owner of the domain or the technical administrator. The domain administrator is responsible for adding and deleting email accounts, and setting specific configurations for the domain.

**Password** - Enter the domain administrator's password for SmarterMail

**Full Name** - Enter the full name of the domain administrator.

Important Note: The creation of a domain administrator account is required by SmarterMail for each domain on the server.

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Max Domain Aliases - Enter the maximum amount of Domain Aliases allowed for this domain. (Use 0 for no limit)

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Enable Domain Spam Options - Check this box to enable "Domain Spam Options" in the Config menu for the domain admin. Domain spam options are inherited by all users within the domain. [more info](#)

Enable Domain Content Filtering - Check this box to enable "Domain Content Filtering" in the Config

menu for the domain admin. Content filtering is inherited by all end users within the domain. more info

Enable Domain Reports - Check this box to enable additional reports for domain administrators.

## Impersonating a Domain Administrator

There are times when you will need to access domain specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to log in automatically as the domain administrator.

To impersonate a domain, click on the login to site link next to a site in the Manage Sites page. A new window will pop up, and will be logged in as the domain administrator of the site. From there, you may edit user accounts, content filters, or whatever other part of the domain needs to be changed.

## Renaming a Domain

Renaming a domain is accomplished by using the Rename Domain option from the manage pop-up menu on the Manage Sites page. This method assures that all items are correctly manipulated in SmarterMail to assure a complete domain rename.

**Important Note:** Users of a domain should be informed of the time their domain is to be renamed. The renaming requires the domain directory to be moved which means no other program or person can be accessing files in that directory until the move is completed.

Old domain name - For reference, the old domain name is shown here

New domain name - Enter the new domain name (ex. example.com)

Click on Save to complete the rename.

## Troubleshooting Tip

If renaming the domain fails multiple tries there is another, easy way to do the same thing (Requires a licensed version of SmarterMail):

- Create a domain using the new domain name
- Copy or move the old domains files into the new domain's directory
- Reload the domain created in step 1. (Reload is found in the manage pop-up menu for the domain)
- Delete the old domain

## Manage Spool

The information in Manage Spool pertains to the messages held by the SmarterMail server pending delivery. The email spool (which stands for "Simultaneous Peripheral Operations OnLine") is a list of emails, in order of when they are created, that are available for the server to send or deliver locally. SmarterMail is multi-threaded, therefore if a message can not process out of the queue 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.

Choose an Action - If an action from this drop down is chosen, the checked messages in the spool will have the action performed on them. See below for a description of each possible action.

Max Rows - Change this to limit the maximum number of messages that show on this page. The spool can sometimes get very large. At the bottom of the table, you can see how many visible and total messages there are.

Sort By - Sorting can assist you in finding particular messages in the spool. Choose a sort option and click the Refresh button to update the view.

Refresh - Click this button to update the page with the most recent contents of the spool

File Name - The filename on the hard disk. Click on the filename to view the message.

Sender - The email address that initially sent the email

Time in Spool - This indicates the total amount of time the message has been in the spool

Attempts - The number of delivery attempts that have been made

Next Attempt - The date and time of the next delivery attempt

Recipients - Shows how many delivered/total recipients there are for the message. Clicking on the value will open the recipients detail page, which is explained more below

Status - Contains the current status of the message

Size - The total size of the message on the hard drive, in kilobytes

## Choose an Action Pull-Down

Items in the spool must be checked before actions will work on them. Click on the checkbox in the table header for a quick method of selecting all or none of the items.

Delete Selected Messages - Deletes messages from the spool that you have checked. No confirmation dialog will show up, so use caution when deleting from the spool

Force Selected Messages - Forces immediate delivery of the checked messages

Delete All Messages - Deletes all messages in the spool, effectively clearing it. No confirmation dialog will show up, so use caution when deleting from the spool

## Recipients

This pop-up window shows the current delivery status of a message. Messages are sent one recipient at a time.

## Enabling and Disabling Services

Arrive at this page by choosing Enable / Disable Services from the Manage menu. This page allows you to control which services are running for your mail server. Generally, all of these should be enabled.

Start All - Click on this button to start all services running

Stop All - Click on this button to stop all services. Any current threads will continue to run and will finish properly, but no new threads will be started

Protocols - A green indicator next to a service indicates that it is running. A red indicator means a service is currently stopped.

Start and Stop Links - Click on the start or stop link next to a service to stop or start that one particular service

## Protocol Types

SMTP - Simple Mail Transfer Protocol is a TCP/IP (Internet) protocol used for sending and receiving e-mail. 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 e-mail and either POP or IMAP for receiving messages that have been received for them at their local server.

POP - With Post Office Protocol, mail is saved in a mail box on the mail server. When the end user reads the mail, all of it is immediately downloaded to the client computer and no longer maintained on the mail server.

IMAP - Internet Message Access Protocol is a standard service used for accessing e-mail from a mail server. IMAP (the latest version is IMAP4) is a client/server protocol in which e-mail 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.

Spool - The Spool service is the internal message queue used to deliver messages locally and to remote services

## Reports

### **Current Blocks Report**

The current blocks report displays a list of all of the IP addresses that are denied from using the mail server. SmarterMail monitors the usage and activity of IP addresses and detects if a certain IP is abusive. These settings, which can be adjusted under the Config menu in Abuse Detection, will keep track of IP addresses that are sending too many messages and block them temporarily. Abuse Detection makes available more bandwidth, space, CPU usage and memory for actual clients and accounts. more info

### **Current Connections Report**

The connections page show all connections currently active in the SmarterMail service. These connection are broken down by the type of connection made: SMTP, POP, or IMAP.

Connections are shown in each category, listing the IP address making the connection, as well as how many connections that IP has.

Note: Multiple connections does not necessarily mean abuse or unclosed sessions. Often networks will use a single IP allowing multiple users and computers to connect from a single location or IP.

### **Domain Aliases Report**

The domain alias report shows you a list of all domain alises on this server. This can be helpful when trying to figure out what a domain alias points to. You may click on a row to go to the domain alias setup page for the domain.

## Domain Bandwidth Report

The domain bandwidth report allows you to view mail bandwidth usage by domain over a specified period of time. This information can be used to see abuse or usage trends for your domains. In some cases, administrators can use this information to bill customers for excessive usage. All statistics are totals for the date range specified.

Start Date - The beginning of the date range to calculate

End Date - The end of the date range to calculate

Sort By - The report will be sorted in the order chosen from this drop down

Generate Report - Click this button to generate the report with the settings you have chosen

## Domain Disk Usage Report

The domain disk usage report allows you to view the current disk space allocated to each domain on your server. This information can be used for billing, detecting usage trends, or pinpointing abuse.

Sort By - Choose the sorting mode from the drop down list

Generate Report - Click this button to generate the report with the settings you have chosen

## Server Status Report

The Server Statistics page allows you to view active statistics for the mail server as a whole. This information can help in monitoring mail abuse or usage trends from the date and time the service was first started.

The first table includes the exact date and time that the SmarterMail Service was started and how long it has been running.

On average, one POP or SMTP thread is capable of supporting one email message. IMAP is different in that IMAP can support multiple threads for a single connection. You can track the number of threads your mail server is processing, if you are getting close to your servers maximum, and more. If you do see that you are nearing the maximum thread settings, you may want to adjust your configurations or hardware as exceeding a thread maximum may result in a loss of email service until more threads are made available. The second table has the current status, last five minute average, last hour average and the averages since the service started for the following items:

IMAP Threads - the number of threads processed for incoming mail using IMAP. As stated, IMAP can process multiple threads for a single connection.

POP Threads - the number of threads processed for incoming mail using POP. Generally, this is a one-to-one correlation (one incoming message per thread).

SMTP Threads - the number of threads processed for outgoing mail.

Relay Threads - the number of threads used for processing the delivery of outgoing mail.

Messages in the Spool - the number of messages currently awaiting processing. All mail, regardless of whether it is incoming or outgoing mail, goes into the spool prior to either being sent or received.

Messages Sent - the number of messages sent from the server.

## Settings

### Abuse Detection

SmarterMail has several methods of preventing abuse and Denial Of Service (DOS) attacks. The ones that can be configured are explained below. Click on the Save button to save changes to this page.

Email Harvesting Prevention - 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. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists if you enable this option.

- Detection Time Frame - 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 targetting, but rather those that are attempting to compromise or harass your customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

Internal Spammer Detection and Notification - Enabling this feature in SmarterMail will alert an administrator whenever a multiple emails are received on the server of the same size.

- Detection Time Frame - The period of time in the past that is examined to determine if an alert should be sent. Too many duplicate emails in this period of time, and an alert will be sent.
- Messages Before Notify - After this many duplicate messages are received within the time

period specified, the email notification is sent.

- Email to Notify - The administrator account to which the notification will be sent.

SMTP/POP/IMAP Denial of Service (DOS) Prevention - 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. Leaving all of these options set to 0 (zero) will disable abuse detection. 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.

- Detection Time Frame - 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 pretty high value so that you can catch DOS attacks while not impacting legitimate customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

## Anti-Virus Administration

From this page you can enable SmarterMail to work with virus scanners that support a quarantine directory. SmarterMail has the ability to check the quarantine directory and respond to users who attempted to send an email containing a virus.

Virus scanner installed on server - Check this box to enable SmarterMail to start taking action for messages marked in the quarantine directory.

Quarantine Directory - Enter the full path to the quarantine directory set for the server.

Virus Action - Choose the action to be taken when an email contains a virus. The available options are shown below.

- Delete Recommended - This option will enable the SmarterMail service to delete any associated files attached to this message from the spool directory. This does not take any action on the quarantine directory.
- Inform Sender - This option will inform the 'From' address that a message was received by the server, and because a virus was found in the message, it did not reach the intended recipient. Note: With some of the more recent viruses, this action becomes less useful, as many viruses now spoof the 'from' email address.

## AntiVirus Solutions

For more information regarding recommended anti-virus solutions, along with detailed instructions on setting them up, [click here](#) .

## Blacklist / Whitelist

From this page you can control which IP addresses are blacklisted (not allowed) from mail services on this machine, or whitelisted (trusted) to access the mail services on this machine.

Note: Whitelisted IP addresses are not subject to relay restrictions which you may have imposed.

Exercise caution when granting a whitelist to a server, and be sure that you know what services on that server may send mail through your server.

Add IP(s) - Click on this button to add an IP address or an IP address range to the list

Edit an Item - Click on a row to edit the whitelist or blacklist settings for the entry

SMTP / POP / IMAP - An X in one or more of these columns indicates that the blacklist or whitelist is active for that IP address or range for the protocol listed.

Delete Link - Click on this link to remove an entry from the list

## Adding / Editing an Entry

IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to add only a single IP. (ex: 192.168.1.26)

IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be added. (ex: 192.168.1.1 - 192.168.1.255)

Blacklist or Whitelist SMTP / POP / IMAP - Check the boxes for the protocols you wish to include in the blacklist or whitelist entry

## Default Domain Settings

From this page you can create global default settings that will automatically be used when adding a new site through either the Web Interface or through the Web Services. These default settings can be overwritten and are only intended to avoid needless data entry.

Changing these settings has no bearing on domains that have already been setup.

Domains Path (prefix) - This is the root path under which domains will be created by default. Email accounts are managed much easier when all domains are under one or two parent directories.

IMAP Port - Internet Message Access Protocol (IMAP4) uses a default port of 143. If you would like to use a different port for IMAP on new sites, enter it in this box. It is not recommended that you change the default port unless you are behind a firewall that requires this setting to be changed.

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Require SMTP Authentication - Check this box if you want SMTP Authentication to be used the end users of this domain. Each user must then supply an email address and password in order to send email from their account. The authentication methods supported by SmarterMail are Cram-md5 and Login .

Max Domain Disk Space - The total amount of space, in megabytes, that the Mail Server will allow new domains to use. Once this limit is reached, SmarterMail will refuse to accept any new mail for the domain. (Use 0 for no limit)

Max Users - The maximum number of user email accounts that can be added to new domains. (Use 0 for no limit)

Max User Aliases - The maximum number of fake email accounts (forwarded to a true email account) that are allowed for new domains. (Use 0 for no limit)

Max Domain Aliases - Enter the maximum amount of Domain Aliases allowed for new domains. (Use 0 for no limit)

Max Lists - Enter the maximum amount of mailing lists allowed for new domains. (Use 0 for no limit)

Max Mailbox Disk Space - Used when adding users to a domain, this value represents the disk space allotted to each user by default. (Use 0 for no limit)

Max Message Size - Enter the maximum total size of an email in kilobytes that an end user can send at one time. This number includes text, html, images and attachments. (Use 0 for no limit)

Max Recipients per Message - Enter the number of email addresses a user can send a message to at one time. (Use 0 for no limit)

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Enable Domain Reports - Check this box to enable additional reports for domain administrators.

## Domain Forwarding

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. For more information about the roles of Domain Forwarding, please see [Gateways and Other Server Roles](#) .

When messages come in to a forwarded domain, they are run through the command-line exe referenced in Protocol Settings. They are also delayed according to your delivery delay. 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.

To establish domain forwarding, go to the Settings -> Domain Forwarding menu and choose to add a target server. Enter the server that should receive the mail and add the domains that should be forwarded to it, one per line.

Note: If you do not host any actual domains on the server, in order for your mail server to listen for traffic, you need to set up a dummy domain (example.com) to listen on the IP and ports from which you expect traffic.

## Folder Auto-Clean

The Folder Auto-Clean feature of SmarterMail is to aid administrators in keeping mailbox sizes under control. Using Folder Auto-Clean, common folders like Junk E-Mail, Sent Items, and Deleted Items can be regularly cleaned of old messages so they do not clutter the user's mailbox. As the system administrator, you can choose to let domains and users override your suggested settings, or require them to use the policies you set.

Allow domains to override auto-clean settings - Check this box to allow domains to change the settings on this page. This is recommended, as many domain administrators have their own ideas of what an acceptable auto-clean policy is. Uncheck this box to lock the settings for all domains and all users.

## Folder Settings

Under each folder that has auto-clean options, you will see the settings below.

Enable auto-clean - Check this box to auto-clean the folder when it gets too big.

Folder size before auto-clean - When the folder reaches this size (in megabytes), auto-cleaning will be activated.

Folder size after auto-clean - Auto-clean will attempt to reduce the folder to this size or smaller when auto-cleaning is performed.

## General Settings

The General Settings page is where you control many of the global settings for the SmarterMail server.

For first time users, we recommend the first change to be the System Admin Username and the System Admin Password to avoid anyone getting into your system using the default login.

System Admin Username - This is the log in name associated with the System Administrator's account for the SmarterMail Server. You will use this name instead of a "Full email address" when logging in as the System Administrator

System Admin Password - This is the password associated with the System Administrator's account. Passwords are case-sensitive.

Host Name - Enter the host name of this server. It is sent to connecting servers to identify the server

Postmaster Mailbox - Every mail server requires a main email for the postmaster. This is usually the owner or Administrator of SmarterMail

Gateway Server - Specifying the IP address of a gateway server in this box and checking the Enabled checkbox will turn on gateway mode. Relaying to a gateway will send or route all outgoing mail to another SMTP server before it reaches its final destination. The destination SMTP server would have to be configured to take relays from your particular IP address. For example, if the destination SMTP server was a SmarterMail Server, then the IP from the original mail server would need to be added to the White List unless "anyone" was selected for the "allowing relay for" option. For more information about the roles of Gatewaying, please see Gateways and Other Server Roles .

Important Note: When using a mail gateway, SmarterMail statistics may not be accurate due to the fact that a single mail with multiple recipients, is only handed off as one, but would have been sent as multiple emails.

Allow Relay for - 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, you can set the type of relays you will allow, or completely disallow mail relay altogether:

- Nobody - This option will restrict mail sent to only work via SMTP authentication, and with accounts on the local SmarterMail Server except for IPs on the White List.
- Only Local Domains - Limits relay access only to mail hosts (domains) on your SmarterMail Server.
- Only Local Users (Recommended) - Limits relay access to users (email accounts) for a valid domain 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.

Double Bounce Action - When an inbound email does not match an account or alias, and it is unable to be returned to the original sender, you can select from the drop down list to either forward it to the postmaster account or delete the message.

Max Delivery Threads - Enter the maximum amount 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 can not be sent right away.

**Delivery Delay** - This option will hold mail in its spool for this amount of time prior to sending the mail. The benefit of a delivery delay is so that if you have a secondary service, like a virus checker, that needs access to the mail prior to its delivery, you give the secondary service ample time to interact with the message prior to it leaving the mail server.

**Time Between Retries** - 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 attempting to be resent. This is the time between retries. The server attempts to resend emails 4 times before it is bounced.

**Command timeout** - The amount of time, in seconds, that the server will wait while waiting for information from the remote server. In general, a timeout between 45 to 75 seconds should suffice.

**Auto Responses** - Allows you to restrict what types of auto-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-response option to be as restrictive as your clients will permit.

**Bouncing** - As with auto-responses, certain anti-spam organizations also blacklist those servers that send bounce messages back to spam trap accounts. Again, set this as restrictive as possible.

**Catchall Option** - Check the "Allow bounces and auto-responders for catchall messages" 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.

**Mailbox Cache Timeout** - This setting allows server administrators to set the period the server will cache a mailbox. If the mailbox cache is reached, it will also release any message cache from that mailbox. Higher values require more memory, but result in better performance.

**Message Cache Timeout** - This setting allows server administrators to set the period a server will cache a message. Higher values require more memory, but result in better performance.

## Log Settings

In order for you to know what activity is happening on your server, SmarterMail has multiple logging options for various parts of the mail server. Use this page to manage how logs are written and how much detail is written.

Unless you have a good reason to have more detailed debugging, "Exceptions Only" is the recommended setting for best performance.

**Log Path** - This is 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.

**Auto Delete Log Files** - Log files older than the number of days specified in this field will be automatically deleted. Set it to 0 to disable this feature.

**Enable Log Write Caching** - This option will greatly increase the speed of logging operations, as logs are written in larger operations. Leaving this box unchecked will require the server to write every log entry immediately onto the hard drive.

**Delivery Log Level** - The log level for message delivery and spool operations. See below for a description of log levels.

**SMTP Log Level** - The log level for SMTP sessions. See below for a description of log levels.

**POP Log Level** - The log level for POP sessions. See below for a description of log levels.

**IMAP Log Level** - The log level for IMAP sessions. See below for a description of log levels.

## Log Levels

**Exceptions Only** - Small size logs that record only errors

**Normal** - Small size logs that record operation overviews

**Detailed** - Medium size logs that record most activity taken on the mail server.

**Light Debug** - Very detailed logs that can get very large. Only enable this option when asked to by SmarterTools Support.

**Normal Debug** - Very detailed logs that can get very large. Only enable this option when asked to by SmarterTools Support.

**Detailed Debug** - Very detailed logs that can get very large. Only enable this option when asked to by SmarterTools Support.

## Protocol Settings

This configuration page allows you to establish policies for the standard email protocols.

**Session Timeout** - After a connection fails to respond or issue new commands for this number of seconds, the connection will be closed

**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

**Maximum Bad Commands** - After this many unrecognized or improper commands, a connection will be automatically shut off

**Maximum Threads** - Some protocols in SmarterMail allow you to specify the maximum number of connections. One connection maps to one thread in SmarterMail. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization

**Spool Path** - This is 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

**Command-line EXE or batch file** - Enter the full path to an executable you wish to process incoming messages with. Use %filepath as an argument to pass the path to the email file to the executable. It is important to set a reasonable delivery delay to prevent SmarterMail from attempting to deliver the message while the executable is still accessing it. It is safe 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. The command will not be executed if the Enabled box is not checked.

**Enable VRFY command** - Check this box to enable the Verify Mailbox command in SMTP. This will allow others (including other mail servers) to verify an email address on the server. This is considered by some to a security risk, and should not be checked without understanding the ramifications.

**Enable EXPN command** - Check this box to enable the Expand List command in SMTP. This will allow others to list all users associated with an alias or list. This is considered by some to a security risk, and should not be checked without understanding the ramifications.

**Bypass relay settings when using SMTP authentication** - When this option is checked, senders that are verified with SMTP authentication can send from any address, and relay settings are ignored. When this option is not checked, relay restrictions are enforced even when the sender is authenticated.

## Skins

SmarterMail supports an easy to use method of skinning that will allow you to cobrand SmarterMail to look more like your corporate identity. This page allows you to upload new skins or set the currently active skin.

**Upload Skin** - Click here to upload a new skin archive to be installed in SmarterMail. More information can be found below.

**Set Active Skin** - To set the currently active skin, click on the row of the skin you want to enable.

Delete link - Use this link to permanently remove a skin from your SmarterMail installation. Any skin that is marked as protected may not be deleted.

## Uploading a Skin

File to Upload - Browse to the zip archive that contains the skin. For more information about skinning in SmarterMail, please refer to the skinning guide .

Upload and Install - Click here to send your skin to the server to be processed.

## SmartHost Servers

SmartHosting allows one SmarterMail server to accept mail for another SmarterMail server. This can be used in a backup scenario so that if the primary mail server goes down, the secondary server will accept mail for it until the server goes back online. For more information about the roles of SmartHosting, please see Gateways and Other Server Roles .

To configure SmartHosting correctly, changes need to be made on the secondary server and to DNS records of domains that will have SmartHosting supported.

- Add SmartHosts - In the secondary server, add all IP addresses of the primary server to the SmartHost list. Mail that resolves to MX records that do not match these IP addresses or accounts on the secondary server will be rejected.
- Setup MX records - In DNS, add an MX record for the secondary mail server that has a LARGER preference value than the primary mail server. Refer to your DNS server documentation for instructions on adding MX records. Note: In MX records, lower preference value servers are tried first.
- Set appropriate retry times - Since the intent of SmartHosting is for the secondary server to be a backup server, adjust the retry times in General Settings to values that are more conservative. Good defaults would be: 10 minutes, 10 minutes, 10 minutes, 1440 minutes.

Note that it is good practice to disable the spool service on the secondary server if the primary server goes down for more than 30 minutes, then restart the spool once the primary server is back online. In this way, all messages will still be accepted through the SMTP service, but delivery will not keep trying to deliver the messages. Once you get the primary server online again, start the spool service on the secondary server and all the messages will start to be delivered.

## SMTP Authentication Bypass

SMTP Authentication is a security measure that can strongly help in the fight against spam and

unauthorized email. 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 the servers / sites to SmarterMail's SMTP Authentication Bypass. Any IP address entered into this page will not be asked to provide an SMTP Authentication login.

In this list you can see all IP addresses that are bypassing SMTP Authentication.

Add IP(s) - Click on this button to add additional IP addresses to the bypass. More information can be found below.

Delete Link - Clicking on the delete link next to an IP removes it from the bypass

## Adding a Bypass

IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to bypass only a single IP. (ex: 192.168.1.26)

IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be bypassed. (ex: 192.168.1.1 - 192.168.1.255)

## SMTP Blocked Senders

The SMTP Blocked Sender list is an effective method of temporarily cancelling a domain or user's ability to send or receive email on the server. For example, if a particular account is sending an abnormal amount of email, you can add their address to Blocked Senders and they will be unable to send or receive email.

Add Block - Click on this button to add a block to the blocked sender. More information is available below.

Delete Link - Click on the delete link next to a block to remove it from the list

## Adding a Block

Rule Type - Choose the type of search that will be performed. To block an entire domain, choose Ends With

Text - Enter the text that will be searched for when processing. (ex. example.com or email@example.com)

## SMTP Blocked Recipients

The SMTP Blocked Recipients page allows you to add recipients to which messages will not be sent.

## Forwarding BlackList

**Add Block** - Click on this button to add a domain to the list. This domain will not be able to receive forwarded messages.

**Delete Link** - Click on the delete link next to a block to remove it from the list

## Adding a Block

**Entries to Add** - Type in the name of domains that should be blocked.

## Spam Checks

Due to the flexible nature of SmarterMail's Anti-Spam 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 Spam Options .

In SmarterMail 2, a new type of spam check has been added, called Bayesian Filtering. Bayesian Filtering uses statistical analysis to identify whether or not an email appears to be spam. It is one of the more effective spam protection measures available. Tying it together with blacklists and reverse DNS allows you to be quite sure that email is or is not spam.

**Add List** - Clicking on this button will allow you to add one of the many spam blacklists to your setup. More detail on how to add a list can be found later in this topic.

**Enable/Disable** - Click on the enable or disable links to change whether or not the check is active or not.

**Delete** - Click on the delete link for a spam check to delete it permanently from the system. Note that you cannot delete Bayesian Filtering or Reverse DNS, but you can disable them.

**Edit a Spam Check** - Click on the name of a spam check to edit it. The screen that appears depends on what type of spam check you are editing.

## Adding / Editing a Spam List

**Name** - A friendly name for the list that will help you and your customers identify it

**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.

DNS Server - Spam lists operate through DNS. As a result, each list provider gives out a DNS server that contains the blacklist. Enter it in this box.

Description - This field allows you to store additional information about the list

## SPF Filtering Options

Pass - 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 - 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 - 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 - 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 - Indicates that the email sender does not publish an SPF record or there is a syntax error in the 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 popular on the internet.

## Editing Bayesian Filter Settings

Weight - The default weight for this spam check. If an email has a high probability of being spam based on its content, this is the value that will be added to the message's total spam weight.

Max memory to allocate for filtering - Bayesian Filtering can be memory intensive. As a result, SmarterMail allows you to configure the maximum resources that will be dedicated to Bayesian Filtering. In general, the more memory you reserve for Bayesian Filtering, the more accurate the results will be.

Messages required for filter update - Once this number of messages have been processed as known-good or known-spam email, SmarterMail will re-analyze the filters to help your system protect against new spam threats. In this way, Bayesian Filtering can become more tailored to handle the mail of the domains on the server.

## Common Spam Lists

Name	Web Site	DNS Server
------	----------	------------

ORDB	<a href="http://www.ordb.org">http://www.ordb.org</a>	relays.ordb.org
SpamCop	<a href="http://www.spamcop.net">http://www.spamcop.net</a>	bl.spamcop.net
SpamHaus SBL+XBL	<a href="http://www.spamhaus.org">http://www.spamhaus.org</a>	sbl-xbl.spamhaus.org
VisiRelays	<a href="http://relays.visi.com">http://relays.visi.com</a>	relays.visi.com

## Spam Options

Once spam checks are run against incoming email (see Spam Checks for more details), the weights of all checks are added up and used to determine the overall spam probability of the email. Use this page to set the levels and policies of these probabilities.

Allow domains to override weights - Many domain administrators have their own opinions on what spam checks work best for their domain. Check this box to allow them to override the spam options if they wish.

Skip spam filters on intra-domain email - Checking this box will skip spam filtering when messages are sent from from within the same domain (e.g. user1@example.com to user2@example.com).

Current Spam Check Weights - This section shows the current spam weights as assigned in Spam Checks .

Weight Threshold - Once a message's spam weight goes over this threshold, it will be counted at this level of probability

Action - The action to take when a message ends up with this probability.

## Additional Admin Topics

### Automating Log In to SmarterMail

This HTML code below demonstrates how you can make a text link (e.g. "Log into your mail") automatically log a person in to the SmarterMail application. By putting a hidden form on a simple web page, you can fill in the "Email Address", and "Password" information either via hard coding the data or through a scripting language like ASP, ASP.Net or ColdFusion.

For the example code listed below, we have the form values set to generic text (e.g.

"Actual\_Email\_Address\_Here") to show where you would hard code values that are submitted to the login.aspx page. You could also dynamically generate these values using a scripting language like ASP or ColdFusion (a sample ASP script would substitute value="Actual\_Email\_Address\_Here" with value=<% =email %>). The form action shown (<http://127.0.0.1:9998/smartermail/login.aspx>) uses the default location of the Smartermail Web Interface. If you have created a separate web site for Smartermail, or assign a different IP address for Smartermail within IIS, this action would have to be

altered to reflect this change. This example demonstrates how easy and powerful the Smartermail application is in allowing companies to automate entry into the mail application.

```
<html>
```

```
<head> <meta http-equiv= "Content-Language" content= "en-us" > <meta http-equiv= "Content-
Type" content= "text/html; charset=windows-1252 "> <title>Smartermail Login</title> </head>
```

```
<SCRIPT LANGUAGE= "JavaScript" > function GoToMail() { document.mailform.submit(); }
</SCRIPT>
```

```
<body>
```

```
<form name= "mailform" action= "http://127.0.0.1:9998/Login.aspx" method= "post" > <input type=
"hidden" name= "shortcutLink" value= "autologin" id= "shortcutLink" > <input type= "hidden"
name= "email" id= "email" value= "Actual_Email_Address_Here" > <input type= "hidden" name=
"password" id= "password" value= "Actual_Password_Here" > </form>
```

```
<p><a href= "JavaScript:GoToMail()" > Log into your mail </a></p>
```

```
</body>
```

```
</html>
```

## 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.

To view the web services and the corresponding functions available to you, go to your default Web Interface install location and append "services/SERVICENAME.asmx". Your particular SmarterMail

location can be the specific IP address of the Web Interface (e.g. if you installed SmarterMail with the default installation you would use <http://127.0.0.1:9998/services/SiteAdmin.asmx>, etc. or a specific IP address you assigned for the Web Interface if you custom-installed SmarterMail or moved SmarterMail to a new web server) or a specific site name if you configured SmarterMail as an actual website within IIS (e.g. [mail.example.com](http://mail.example.com)). Below you will find a brief explanation of the web services available to you, along with the default installation paths to the specific web services details page.

## User Alias Administration

<http://127.0.0.1:9998/Services/svcAliasAdmin.asmx>

There are six (6) functions of this service available for customization. These services allow developers and/or System Administrators to dynamically create email aliases using SOAP, an HTTP GET command, or an HTTP POST command.. The functions, and their corresponding functions, are:

- DeleteAlias - will delete a specified email alias.
- UpdateAlias - will update a specified email alias.
- GetAlias - will return information on a specified email alias.
- AddAlias - will created an email alias and add it to the specified domain.
- GetAliases - will return all aliases that belong to a specified domain.
- SetCatchAll - Sets the specified alias to be the catch-all, or clears the catch-all if a blank alias name is provided.

## Domain Administration

<http://127.0.0.1:9998/Services/svcDomainAdmin.asmx>

There are twelve (12) functions of this service available for customization. These services allow developers and/or System Administrators to dynamically add or delete domains, return domain defaults, set a primary domain, and more using SOAP, an HTTP GET command, or an HTTP POST command (examples for each are provided as well). The functions, and their corresponding properties, are:

- RenameDomain - Renames the specified domain
- GetDomainSettings - Returns the default domain settings in a DomainSettingsResult object
- GetDomainInfo - Returns the default domain settings in a DomainSettingsResult object
- AddDomain - Creates a new domain in the specified folder
- UpdateDomain - Updates the settings for the specified domain
- GetAllDomains - Returns a list of all domain names
- GetDomainDefaults - Returns the default domain settings in a DomainSettingsResult object

- UpdateDomainNameAndPath - Changes the specified domain's name and/or path
- DeleteDomain - Deletes the specified domain
- GetDomainStatistics - Returns the statistics for the specified domain over the specified period of time
- ReloadDomain - Reloads the specified domain's settings
- SetPrimaryDomainAdmin - Sets the specified user to be the primary domain admin of the specified domain

## Mail List Administration

<http://127.0.0.1:9998/Services/svcMailListAdmin.asmx>

There is only one function for this service. Due to amount of possible commands for list serv, it would require an almost unusable amount of commands to manage list serv via web services. What is offered as a web service is simply the removal of all lists (settings concerning lists are in the domain setup service).

- DeleteAllLists - Deletes all mailing lists that belong to the specified domain.

## Product Info Web Service

<http://127.0.0.1:9998/Services/svcProductInfo.asmx>

There are four (4) functions of this service available for customization. These services allow developers and/or System Administrators to dynamically activate or retrieve licensing information, return product name and version number, and more using SOAP, an HTTP GET command, or an HTTP POST command. The functions, and their corresponding properties, are:

- ActivateLicenseKey - will activate the product with a previously set license key using the specified SmarterTools account credentials.
- GetLicenseInfo - returns the license key for the product.
- GetProductInfo - will return the product name and version number.
- SetLicenseKey - will set the product license key.

## Global Update Web Service

<http://127.0.0.1:9998/Services/svcGlobalUpdate.asmx>

There are three(3) functions for this service. These services allow server administrator to set/update settings for every domain on the server using SOAP, an HTTP GET command, or an HTTP POST command. The functions, and their corresponding properties, are:

- UpdateAllDomainSettings - sets the supplied fields and values for all domains on the server.
- ListGlobalUpdateFields - lists all the fields that can be updated using UpdateAllDomainSettings.
- GetGlobalUpdateStatus - gets the current status of the update (ex. 550 of 1335 domains updated)

## Domain Alias Administration

<http://127.0.0.1:9998/Services/svcDomainAliasAdmin.asmx>

There are four (4) functions for this service. These services allow server administrator to add/remove and check domain aliases for a given domain using SOAP, an HTTP GET command, or an HTTP POST command. The functions, and their corresponding properties, are:

- DeleteDomainAlias - Deletes the specified domain alias.
- GetAliases - Returns all domain aliases that belong to the specified domain .
- AddDomainAlias - Creates a new domain alias and adds it to the specified domain.
- AddDomainAliasWithoutMxCheck - Creates a new domain alias and adds it to the specified domain without doing an MX lookup on the new alias.

## User Administration

<http://127.0.0.1:9998/Services/svcUserAdmin.asmx>

There are twelve (12) functions of this service available for customization. These services allow developers and/or Administrators to dynamically create or delete users, return user statistics, return user attributes, update user information and more using SOAP, an HTTP GET command, or an HTTP POST command. The functions, and their corresponding properties, are:

- AddUser - Creates a new user and adds them to the specified domain
- GetUserStats - Returns statistics of the specified user for the specified time period
- GetUser - Returns attributes of the specified user
- UpdateUserAutoResponseInfo - Updates the specified user's auto response settings
- UpdateUserForwardingInfo - Updates the specified user's forwarding settings
- GetUsers - Returns attributes of each user in the specified domain
- DeleteUser - Deletes the specified user from the specified domain
- GetUserAutoResponseInfo - Returns the forwarding info of the specified user
- GetUserForwardingInfo - Returns the forwarding info of the specified user
- AuthenticateUser -Returns a response on whether the supplied user/domain/password is valid
- LoginValidated - Returns a LoginResult object with the LoginValidated field set to True if the specified username matches the specified password

## 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, an Outgoing Gateway, and a 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**

- 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

- 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

## Proper DNS Settings for Email

There are several major things to set up on your DNS server for each site you add to SmarterMail. How you set these up is dependant upon both who hosts your DNS and what DNS software is used. Check your DNS server documentation for instructions on how to set up the following records (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.

- WebMail URL - Add an A or CNAME record for mail.example.com that points to the IP address of the webmail interface. This will allow users of that domain to access the webmail by typing in <http://mail.example.com> or <http://mail.example.com:9998> in their web browser (depending on whether you use the included web server or IIS).
- Mail Pointer - Add an MX record for example.com that points to the IP address that you assigned when adding the domain to SmarterMail. This will allow other email servers to locate your mail server.
- Reverse DNS Record - Add a reverse DNS record for 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 Hotmail and AOL are starting to 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.

## Skinning Guide

SmarterMail allows you to customize its look and feel to suit your own needs. Instructions on skinning the web interface can be found below, as well as some notes that are important to understand.

### Skinning Process

- Download the base skin module. Download [here](#)
- Extract the contents into a temporary folder
- Modify the files using any of the common HTML / CSS editors on the market to adapt it to the look you want. Keep all tags that are surrounded by [brackets]. These are where controls will be added that contain the sidebar elements, body content, etc. For more details on each of the files and tags, see the section below.
- If desired, change any of the images in the Images directory
- Edit the Skin.xml file with notepad or an XML editor and modify the following:
  - Title - Input the title of your skin
  - Author - Input your name, or the name of your company
  - Save all files and make a new zip archive that contains all of the files. The structure of the zip file needs to remain the same as the skinbase.zip file you downloaded.
  - Log in to SmarterMail as the administrator
  - Upload your skin in Settings - Skins, which will make it available to select as an active skin.

### Restrictions

- The name of the product (SmarterMail) must remain visible in the skin. You may use a term like "Powered by", but the reference to SmarterMail must exist on the page.
- The [Copyright] tag must exist in the page, and must remain visible in the skin.

### Skin Files

- Skin.xml - This XML file establishes the general properties of the skin, most notably the author and name of the skin. In the event that you give your skin to others, this helps to identify who made the skin.
- Login.htm - The template used for the display of the login page
- Plain.htm - The template for the inner frame where messages are viewed, as seen when reading a message
- Standard.htm - The template that is seen most of the time in SmarterMail, with a sidebar and a top menu
- SysAdmin.htm - The template seen by the system administrator, with a sidebar and a top menu

- Calendar.css - This style sheet establishes the look and feel of the popup calendar
- Layout.css - General layout styles are contained in this style sheet, including colors, etc. You may modify the styles, but do not delete any styles from this file to ensure proper operation of SmarterMail.
- LayoutPlain.css - Layout styles for the Plain.htm file are contained in this file. You may modify the styles, but do not delete any styles from this file to ensure proper operation of SmarterMail.
- Skin.css - Skin-specific styles reside in this file. You may alter it as you see fit

## Bracket Tags

- [PAGETITLE] - Inserts the title of the page. This is most frequently used between <title> tags.
- [HEADITEMS] - Required placeholder for additional items that SmarterMail needs to add to each page. Must be contained withing <head> tags.
- [LOGGEDINAS] - Sidebar box for "Logged In As".
- [FOLDERLIST] - Sidebar box for the folder list, or the real time statistics if user is the system administrator.
- [SEARCHBAR] - Sidebar search box that allows searching of domains for system administrators or email messages for other users.
- [PRODUCTNAMEANDVERSION] - Text for "SmarterMail Professional Edition" + version. It is required to use this tag in the skin.
- [DOMAINTITLE] - The name of the domain that is logged in to.
- [TIPTEXT] - Placeholder for where errors and messages will appear in response to actions
- [BODY] - Placeholder for the main inner content of the page. This is the big white area in the default skin.
- [COPYRIGHT] - This field is also required to be included and visible in the skin. Displays the SmarterMail copyright.
- [FOOTERCONTENT] - Used by SmarterMail internally. This tag must remain in all files in which it appears
- [MENU] - Placeholder for the main pull-down menu

## Logging in to SmarterMail - System Admin

You will need to open a web browser to the location of your 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.



Please log in to SmarterMail...

Full email address (ex. user@domain.com)  
admin

Password  
•••••

Language  
Use Browser Language

Remember me

 Login |  Help

To login to SmarterMail, type in the system admin username and password on the login screen. By default, the username and password are both "admin" (without the quotes). If everything matches up, you will be presented with the manage domains page or the activation wizard (if you have yet to activate SmarterMail).

One thing to notice on the Login page is the "Remember Me" checkbox. By checking this box SmarterMail encrypts your login and password. You can then close the browser window and not have to re-log in when you return. This function works as long as you do not "log out" of SmarterMail prior to closing your browser window. If you do log out, you will have to log back in upon your return, regardless of whether the "Remember Me" box was checked or not. You will need cookies enabled on your browser for this feature to work.

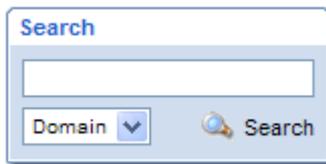
## Using the Sidebar

The sidebar is a new feature added to SmarterMail that allows you to monitor the health and use of your server. Each sidebar item is described in detail below.

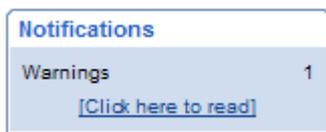
	<p>The "Logged In As" sidebar item lets you see who you are logged in as, and allows you to quickly log out of the SmarterMail Web Interface.</p>
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The "Search" sidebar item lets you type on part of a domain name and click on search to quickly locate it on the manage sites page.



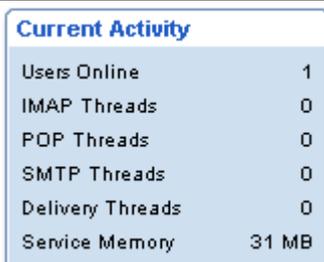
If any errors or warnings are detected by SmarterMail, the "Notifications" box will appear and more details can be obtained. Most of the time, this box will not appear.



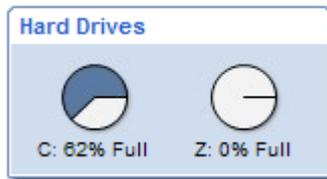
The "General Data" sidebar item shows the number of sites and users hosted by SmarterMail. You can use this to determine when you will need to upgrade your license.



The "Current Activity" sidebar item shows you information about the current use of resources on your server.



	<p>In order to help you keep an eye on the free disk space on your hard drives, the "Hard Drives" sidebar item shows graphs that show you the amount of full disk space.</p>
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## Frequently Asked Questions - System Admins

- General
  - What role does the SmarterMail Web Interface play?
  - How do I create custom skins?
  - Installation
    - Can the Web Interface run on the same server as a stats server, or any other type of software?
  - Troubleshooting
    - My pages won't load in to my browser, it just tries to download the pages. Why?
    - Email messages are not getting sent, could this be a problem with SMTP?
    - I am unable to activate SmarterMail, what do I do?

### General

What role does the SmarterMail Web Interface play? The Web Interface is a powerful tool that is easy to install and configure. The Web Interface is a dynamic web site that after installation on any one server in your network, it is accessible from any browser locally or from the Internet. It allows the creation of Internet accounts so up to an unlimited amount of users can log in and view email for any domain.

How do I create custom skins? Refer to the Skinning Guide topic, which can be found under the "Additional Admin Topics" section of the System Administrator help.

### Installation

Can the Web Interface run on the same server as a stats server, or any other type of software? Yes. SmarterMail Professional Edition can run in combination with any other products. A common configuration for a startup hosting company is a multi-purpose machine for stats, mail, web server etc. Optimize a server delegating large amounts of email traffic by dedicating it solely for email.

## Troubleshooting

My pages won't load in to my browser, it just tries to download the pages. Why? Chances are the .NET framework was installed prior to installing IIS. When you install IIS first, then install the .NET framework, all proper mappings for .aspx, .asmx, etc. pages are made. However, this does not happen if you install the .NET framework prior to installing IIS. If this is the case, there are three ways re-map .NET v1.1 to fix it:

- Manually re-map .NET version 1.1 (choose one):
  - Go to Start -> Run -> and type "command.com".
  - At the command prompt, type "aspnet\_regiis -i" (less the quotation marks).
  - This command will configure all applications to have the proper .NET extensions within IIS.
  - Type "exit" (less the quotation marks) to exit the command prompt.
  - From "add remove programs" in the "control panel", uninstall .NET v1.1, then reinstall with windows update."
  - From "add remove programs" in the "control panel", uninstall SmarterMail, then reinstall

Email messages are not getting sent, could this be a problem with SMTP? The SmarterMail Service could be conflicting with the IIS Virtual SMTP. To disable IIS Virtual SMTP:

- Open the Control Panel - Administrative Tools - Internet Information Services
- Open the "Web Sites" tree
- Look for IIS Virtual SMTP, if it exists, right click on it and select disable.

I am unable to activate SmarterMail, what do I do? If you are unable to activate once SmarterMail is installed, you need to contact our support department. [Click here](#) for our contact information.

## Release Notes

Current release notes are available at

<http://www.smartertools.com/Products/SmarterMail/ReleaseNotes.aspx>

## Glossary

Below is an alphabetized list of the various terms and phrases used in describing a Mail Server package.

**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.

**Account** - An account consists of an email address and a password, used to log into a mail server to retrieve or send mail.

**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.

**Bayesian Filtering** - A statistical method of spam detection, Bayesian filtering uses the probability that certain words appearing in email are spam to identify emails that are likely spam.

**Black List** - Block email from email addresses and domains added to this list.

**Content Filtering** - This filter allows a user to search incoming messages for certain words or string of words to either delete, so it never reaches its final destination, or move to a separate folder away from the main inbox.

**Domain** - A domain is the name associated with the last half of an email address, it resides after the @ symbol. (e.g. in support@smartertools.com, smartertools.com is the domain.)

**Domain Admin** - The owner of a particular domain responsible for adding and deleting email accounts and setting configurations associated with that domain.

**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.

**Domain Name Server (DNS)** - A Domain Name 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.

**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 E-Mail 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 e-mail from your local server. IMAP (the latest version is IMAP4) is a client/server protocol in which e-mail 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** - 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** - 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.

**Killlist** - A list of domains that are denied access to the mail server.

**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. (A list server should not be confused with a mail server, which handles incoming and outgoing e-mail for Internet users.)

**Mailbox** - A folder that contains messages.

**Mail 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 e-mail 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.

**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 e-mail. 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 e-mail 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 an 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)).

**Spool/Queue** - 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.

**User** - A client with an email account.

**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.

Web Interface - The point of access for administrators and end users to the Mail Server via browser, created by SmarterTools called SmarterMail.

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.

Weight - The weight is a value assigned to a spam check according to its validity and competency.

White List - Add an email address to this list to accept all mail from the sender, regardless of Black List generalization.