



SmarterMail 4.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
- Locking down your server

Getting Started

This help topic will help you understand how to get SmarterMail up and running, and explains the best practice for installing SmarterMail for the first time.

- 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. 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.
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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.
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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 http://127.0.0.1:9998 . If you have converted SmarterMail to run with IIS, browse to the URL you chose when adding the IIS web site.
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	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.
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Activate SmarterMail

Upon logging in as the administrator for the first time, the product will run as the Free Edition, limited to 1 domain with up to 10 users. If you have a license key for SmarterMail, go to Help -> Activate Product, and you will be presented with the activation wizard. Please refer to the help topic Activating SmarterMail for more information on this process.

	Activate SmarterMail, if necessary.
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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.
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	Enter a new system administrator username and password into the fields in the Security section.
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	Write down the username and password and store it in a secure location.
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	Click on the Save button to save your changes to the system.
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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.
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	Add a domain to SmarterMail, noting it's IP address for the DNS changes below.
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Configure DNS for the Domain

There are three major things to set up on your DNS server for each site you add to SmarterMail: An A Record, an MX Record, and a Reverse DNS Record. 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.

	WebMail URL (A Record) - 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 (MX Record) - 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. Note: Adding reverse DNS may also require a change at your isp.

General Information

What is SmarterMail?

SmarterMail is fully RFC compliant mail server package that is able to support anywhere from one to an unlimited number of domains and an unlimited number of email addresses and that includes complete webmail and anti-spam features. It is built and priced to be both beneficial and accessible to individuals, small businesses, and enterprise-level organizations alike.

SmarterMail provides end users with advanced features such as mail account statistics, user level skinning, and precise user-controlled spam and content filtering. Domain administrators 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, SpamAssassin, ORDB, and others), set a domain-level skin, set domain-level aliases, implement SMTP authentication, and much more.

As an added benefit, both the administrative functions of SmarterMail, as well as end user capabilities are accessible from a standard web browser, giving administrators and end users access and control at anytime, from anywhere. SmarterMail uses industry standard mail protocols, such as POP3 and IMAP4 for incoming mail and SMTP for outgoing mail. It is also compatible with most popular desktop email clients (e.g. Microsoft's Outlook and Outlook Express or Qualcomm's Eudora).

What's new in SmarterMail 4.x?

SmarterMail 4.x adds many new features over previous versions of SmarterMail. These changes are listed below.

Major New Features

- Developed using the Microsoft .Net 2.0 framework, allowing for faster and more efficient operation on your server.
- Anti-Spam Enhancements:
 - Greylisting support reduces the amount of spam that enters your infrastructure by up to 98%.
 - Integrated SpamAssassin support including the ability to integrate with SpamAssassin server clusters to distribute load.
 - Introduction of spam checking and blocking on outgoing messages to prevent your server from being blacklisted by major ISPs.
 - Ability to add spam weight to a message based on content in the header of an email, for use with external anti-spam systems.

- A real-time performance dashboard allows you to monitor the health of your web server.
- The introduction of historical reporting on over 20 items including:
 - Resource Usage
 - Spool Count
 - Spam Messages
 - Scheduled email reports that can be sent to domain and server administrators.
 - Smart Gateways to allow servers to balance load more effectively.
 - ClamAV anti-virus support right out of the box
 - New release of SmarterMailSync for Outlook which includes synchronization of shared resources.
 - Pop Retrieval to allow users to grab email from various external POP accounts(e.g. LiveMail, Yahoo!, etc.) and pull them into their SmarterMail account.
 - Performance enhancements to basic spooling which significantly reduces disk IO time.
 - Support for IMAP IDLE (Added in version 4.2)
 - SSL/TLS connections for SMTP, POP, and IMAP (Added in version 4.2)
 - Numerous general enhancements to help get SmarterMail up and running more quickly.

Webmail Enhancements

- The webmail and system administrator interfaces have been redesigned with speed and usability in mind.
- New webmail features include:
 - Preview pane
 - Lower bandwidth component controls
 - Auto-complete
 - Intuitive welcome page
 - Multiple skins are included out of the box and custom skinning can be easily achieved using .Net 2.0 features such as themes and master pages.
 - Skins can be changed at the system, domain, or even user level with options to disallow overrides.
 - Support for notes and shared notes.
 - Better spell check support with over 20 languages available.

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 via web mail (email account access using a web browser) or 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 Server

The SmarterMail Web Server installs with the SmarterMail Web Interface "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.

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 and earlier	<ul style="list-style-type: none"> We highly recommend you upgrade your browser at http://www.microsoft.com
Internet Explorer	6.0 and above	No known issues
Firefox	1.0	<ul style="list-style-type: none"> Panel bar is not expanded to 100% height until the page is completely loaded
Firefox	1.5 and above	No known issues

Mozilla	1.6	<ul style="list-style-type: none"> • The panel bar extends past the bottom of the page
Mozilla	1.7 and above	No known issues
Netscape	7.2 and above	No known issues
Netscape	6.1 and earlier	<ul style="list-style-type: none"> • We highly recommend you upgrade your browser at http://www.netscape.com
Opera	7.11 and earlier	<ul style="list-style-type: none"> • We highly recommend you upgrade your browser at http://www.opera.com
Opera	8.0 and above	<ul style="list-style-type: none"> • No HTML composing • Minor CSS inconsistencies

Linux Browsers	Version	Known Issues
Konquerer	-	<ul style="list-style-type: none"> • No HTML composing
Mozilla	1.7 and above	No known issues
Mozilla Firebird	0.6.1 and above	No known issues

Macintosh Browsers	Version	Known Issues
Internet Explorer	5	<ul style="list-style-type: none"> • IE for Mac 5.0 does not work with SmarterMail. We suggest using a Mozilla based browser such as Camino for the best experience
Mozilla	1.7.1 and above	No known issues
Camino	1.0 and above	No known issues

Safari	-	<ul style="list-style-type: none"> • No HTML composing • Drop down menus do not function • Many display irregularities • Safari is not recommended with SmarterMail. We suggest using a Mozilla based browser such as Camino for the best experience
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Product and Component Acknowledgements

Interface components produced by



Charting component produced by



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Release Notes

Current release notes are available at

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

Installation and Deployment

Deployment Guides

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), Vista*
- RAM: 512MB
- CPU: 1 GHz Processor or higher
- DISK: 150 Megs
- IIS 5 or higher (Required if you will not use the SmarterMail Web Server)
- .Net 2.0 Framework

* Non server based Microsoft operating systems limit the maximum number of inbound connections to ten. For more information regarding this issue, refer to the links below. [Windows XP Pro EULA](#) | [Vista EULA](#)

It is suggested customers use IIS in place of the SmarterMail Web Server to provide additional security and stability. The SmarterMail Web Server simply allows the product to be fully functional without the existence of a marketed web server. IIS, on the other hand, is an enterprise level web server and when paired with SmarterMail, will provide the highest return on investment. For more information in using IIS to host the web interface, please refer to our [Converting to IIS](#) page.

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 Installations

Domains	Users	Messages per Day	Requirements
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500	3,000	250,000	<ul style="list-style-type: none"> • Windows 2000 or higher • CPU: Dual P3 • RAM: 512 MB
5,000	30,000	1,000,000	<ul style="list-style-type: none"> • Windows 2003 • CPU: Dual Xeon • RAM: 2.0 GB
Gateway	N/A	2,000,000	<ul style="list-style-type: none"> • Windows 2003 • CPU: Dual Xeon • RAM: 1.0 GB

Installation

SmarterMail comes as a single installation file that contains everything necessary to run the product. The SmarterMail installer can be downloaded from <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.

If you have IIS 5.0 or later, it is recommended that you run the SmarterMail web interface under IIS instead of using the built-in web server for performance reasons. See the topic [Running as an IIS site](#) for more information.

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.

Disable the SmarterMail Web Server

While not absolutely necessary, this step will improve security and performance 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
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	Click on the Stop button
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	Change the Startup Mode to Disabled and click on the Apply button
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	Click on the Close button
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Add an Application Pool (Windows 2003 only)

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

	Right-click on Application Pools and choose New -> Application Pool
--	---

	Name the pool SmarterMail (or something equivalent) and click OK
--	--

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
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	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" and click OK
	(Windows 2003 only) Right click on the site name and choose properties
	(Windows 2003 only) In the home directory tab, choose the SmarterMail application pool

Verify IIS Settings

	If you are using Windows 2003, verify that the ASP.NET v2.0.50727 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)
--	---

	For better performance, set HTTP content expiration for 7 days on the App_Themes folder unless you are actively creating a new skin
--	---

	In Windows 2003, alter application pool's performance tab to disable the "Shutdown worker processes after being idle for," or change it to a high value, like 240.
--	--

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.
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[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 http://www.example.com/smartermail .
	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.
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	In the Execute Permissions dropdown box, choose "None"
--	--

	Click on OK to save the settings
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Verify IIS Settings

	If you are using Windows 2003, verify that the ASP.NET v2.0.50727 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.
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Test the Site

	Open up a web browser, and type in the URL of the virtual directory (ex. http://www.example.com/virtualdirectory).
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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 for more than 1 domain with 10 users, 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.

Upon going to the Activate Product page, you will be presented with a screen showing your current license details. 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.

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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. more info
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	If you have IIS 5.0 or later, convert the web interface to run under IIS. more info
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	Login to SmarterMail as the System Administrator. more info
	If you have a license key, Activate SmarterMail. more info
	Change the System Administrator username and password. more info
	Add a domain to SmarterMail. more info
	Configure DNS settings for the domain. more info

Upgrade Instructions

To upgrade an older version of SmarterMail to the most recent 4.x release, perform the instructions below.

Please note that if you are upgrading from a version previous to 4.0, and you are not running under the Free Edition, you will need to upgrade your license key first.

From a previous 4.x release

For example, if you are upgrading from SmarterMail 4.0 to SmarterMail 4.1.

- Backup your SmarterMail installation and data
- Download and run the installer for the updated version ([download here](#))
- When asked where to install the product, install into the same location as it was installed before (by default C:\Program Files\SmarterTools\SmarterMail)
- All configuration data and email will be preserved

From a release before 4.0

For example, if you are upgrading from SmarterMail 3.x to SmarterMail 4.x.

- Backup your SmarterMail installation and data
- Ensure you have a valid license key for SmarterMail 4.x
- Uninstall your current version of SmarterMail. All configuration data and email will be preserved.
- Download and run the installer for the updated version ([download here](#))
- When asked where to install the product, install into the same location as it was installed before (by default C:\Program Files\SmarterTools\SmarterMail)
- If you are using IIS to host SmarterMail's Web Interface, change the mapping of ASP.Net to version 2.0 in the IIS properties for the site. ([more info](#))
- If you are not running the Free Edition, log into SmarterMail as the system admin, go to Help - > Activate Product and reactivate with your license key.

[Help for Email Users](#)

[E-Mail](#)

[Mail Folders](#)

Utilizing folders in SmarterMail is the general method of storing messages that are both sent and received, either from within the web interface or, if you set it up properly, from your email client. 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 the Sent Items folder after sending the first new message from a new email account. For more information about the specific purposes of the folders, see below .

To add or edit your email folders simply choose My Folders from the Settings menu.

[My Folders](#)

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

Folder Auto-Clean - Click this button to edit your auto-clean settings. Users can now auto-clean their inbox if enabled by the System Administrator. For more information about auto-clean, please refer to the help topic My Folder Auto-Clean .

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.

Items - Shows the total number of 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.

Sharing (Enterprise Edition Only) - This will take you to the sharing interface so that you can share the folder with specified users on your domain. More information can be found in the topic Sharing Your Own Resources .

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. Using a backslash character '\' when naming a new folder(e.g. Family\mom) 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 within 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 the connection is closed. For this reason, deleted messages are crossed out until they are "purged" from the folder. This is different from a POP account where 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.

Viewing Messages

When you log in, you will initially be taken to your Inbox or Welcome Page. 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.

Note: Depending on whether you have Show Preview Pane enabled in My Settings, the page may have slight variations. The preview pane allows you to quickly peruse the message. If you have problems using the preview pane , try turning it off, as some browsers and older computers perform better with the non-preview page.

Working with Email

View a Message - Click on a message in order to view it in the preview pane. Double clicking 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 next to messages you wish to 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.
- **Status Icons** - The four status icons inform the user of what actions have been taken for each message in their inbox. The icons as are as follows: the yellow envelope indicates an unread message, the open envelope means the message has been read, the envelope with a blue arrow indicates a reply, while the envelope with a red arrow indicates a forward.
- **Date** - The date the email was received into the mail system. For items received in the past week the time received will also be shown. If just a time is shown then the message was received today.
- **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 black page number is the current page you are viewing. To view a different page, simply click on the page number you wish to view. The "..." will advance to the next set of 10 pages.

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. To have these maintained for you, enable Folder Auto-Clean under My Folders.

Actions

Choosing an action from the drop down list will immediately perform that action 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 on your mail server avoid that type of mail in the future. If a message is marked as spam and it should not have been, select the checkbox next to it and choose Unmark as Spam when viewing it in the Junk E-Mail folder (if available). Remember when viewing Junk E-mail, the default view will be plain text in order to prevent the unwanted loading of images.
- Purge Deleted Items - This option permanently removes all messages that are marked as deleted. 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.

Search

Clicking on the search button will display the search bar which allows you to easily search through all of the messages in your Inbox or other folders. For more information on searching please see the Search Messages topic.

Sharing

Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share an email folder with another user on your domain. It is described in further detail in the topic Sharing Your Own Resources .

Reading a Message

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

Along the top of the reading pane, 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 these, 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. Underneath the header 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.

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 used to forward the message can be customized by several settings in the My Settings page.

Move to Folder - Moves this message to the folder chosen from the drop-down list. After the message is moved, you will remain in the same folder and will navigate automatically to the next message.

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 a message is deleted, the next message in your folder is displayed. 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 Information Header

From - Email address from which the message was apparently sent.

Date - Time and date 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. The default method of viewing messages is HTML, but it can be changed from the My Settings page.

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.

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 your message out to the 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 automatically 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 (;).

Enterprise Edition Only: You can also add members of your Global Address List to an email by clicking on the "To:" link and changing the list source from My Contacts to Global Address List.

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 "blind carbon copies" of the email, addresses that are not the primary intended recipients of the message where but nobody else can see that 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. When viewing the messages in an email folder, click on the Search button in the bar above the message list. When you do, a second bar will appear with various options you can use while searching.

Search Text - The first field is the text you are looking for. Frequently, this will be an email address or a part of an email subject.

Search Type - Choose the type of search from the drop-down box; You can search the from address, the subject, or the body text of messages.

Folder to Search - Choose either the current folder or All Local Folders.

New Only - Check this box to only search messages that are marked as unread.

When you have entered all of the search criteria, click on the Find Now button. 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.

Note: Very large folders will take longer to search, as will searching multiple folders at once. 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 automatically the first time you delete a message.
- **Auto-Purge folder** - When using IMAP or webmail and messages are deleted from a folder, they are only marked as deleted. Messages are not physically removed from the folder until they are purged. This option will automatically purge the folder after deleting the message. **NOTE:** When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.
- **Mark as deleted** - When the message is deleted with this option, the message remains in the current folder, but will be crossed out and marked as deleted. If the folder is then purged, all

items marked for deletion will be removed.

- **Mark as deleted and hide** - With this option, any message that has been marked as deleted will be hidden from view in webmail. This will allow you to keep deleted messages without seeing them every time you log into your mailbox. Note: It is important to keep an eye on your email account disk usage when using this option, as your mailbox may be 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, any emails that are marked as deleted are automatically purged. 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 these folders get too large. However, they may have left the option available for you to override auto-clean settings. In order to see what folders are currently set to auto-clean and to change these settings (when possible), refer to the topic [My Folder Auto-Clean](#) .

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. Messages are deleted from the folders in the order that they were received so that older messages get deleted 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.

Options

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. You can see the current policy on the Folders tab when this option is active.

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

Inbox auto-clean - Users can now auto-clean their entire inbox, if permitted by the System Administrator.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab.

In cases where you are able to override the 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 (messages that were received the longest time ago) 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.

Using Plus Addressing

Plus Addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. To demonstrate this ability, please consider the example of plus addressing below.

An Example

myname@example.com

Assume your email address is myname@example.com, and you want to sign up for a newsletter called ACME News. Furthermore, you want that newsletter to go to a folder in your email called "ACME". Assuming you have plus addressing enabled, as described in the next section, all you have to do is sign up for the newsletter with the email address below:

myname+ACME@example.com

Note that the folder name is AFTER the username but before the @example.com.

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

In addition, if you include the '/' character in your plus address, you can automatically create sub-folders, as in the following example:

```
myname+Newsletters/ACME@example.com
```

This email address will create a folder called Newsletters, then create an ACME folder under it, and drop the newsletter into the ACME folder.

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

Enabling Plus Addressing

In order for plus addressing to work, it must first be enabled for your user. Follow the steps below to turn the feature on:

- Log into SmarterMail.
- Go to the Settings menu and choose My Settings.
- Click on the Plus Addressing tab.
- Check the Enabled checkbox.
- Choose an Action to perform when a plus addressed email comes in:
 - Move to folder - If the target folder exists, the incoming message will be placed into it. If the folder does not exist, it will be created. No more than 10 folders can be auto-created in this method during a six hour period to prevent abuse.
 - Move to folder (if it exists) - If the target folder exists, the incoming message will be placed into it. Otherwise, the email will get placed in the Inbox.
 - Leave in Inbox - Drops the message into your Inbox.

Calendaring

Calendaring Overview

Calendaring allows you to store and retrieve appointment and meeting information from the same place as your email. SmarterMail's calendar system is very flexible and includes many options that can help you keep everything organized.

- Fully configurable appointments with optional recurrence rules.
- Email notification and notification within SmarterMail of upcoming appointments.
- Attendee and invitation status tracking.

- Availability information about attendees (Enterprise Edition only) .
- Integration with Outlook (Enterprise Edition only) .

To get started, click on the My Calendar link in the left sidebar, under the Calendars tree.

Adding an Appointment

There are two methods of adding a new appointment to a calendar. To add one so that it shows up in My Calendar, use the New Appointment link in the left menu under Calendars.

If you wish to add an appointment to a shared calendar (Enterprise Edition Only) , you must be viewing the calendar, then use the New Appointment button from within the page.

For information about inviting attendees, please refer to the help topic Inviting Attendees .

Event

The event tab records the common information about the appointment. Usually, this tab is the only one you will use. The available settings are explained below.

- Subject - This is the short description of the appointment, and is what will appear on calendar pages and reminders.
- Location - The physical location of the appointment. This field is optional.
- Start Date and Time - Enter the start date of the event. If the event will go all day, check the "All Day Event" box.
- End Date and Time - If the appointment does not have a scheduled end time, you may leave the end time blank.
- Reminder - For more information about reminders, please see the help topic Reminders .
- Event Description - Enter the full description of the appointment, if needed.

Recurrence Information

A recurring appointment is one that will happen again at some future date, and usually follows a pattern. A good example of a recurring event is a birthday. For more information about this, please refer to the help topic Recurring Events .

Categories

You may select which category the event should belong to or uncheck them all to specify an event with no category. To add a new category click on the Master Categories button to bring up the categories popup You may add categories by either using a comma(,) to separate them or putting one category per line.

My Calendar

To get started working with your calendar, click on the Calendars tree in the sidebar, and choose My Calendar. There are three primary views of calendars in SmarterMail: Monthly, Weekly, and Daily. These views are very similar, but have a few differences, which are noted below.

Monthly View - The monthly view shows a complete months' worth of appointments. It is meant more as an at-a-glance type of calendar that outlines a general idea of the upcoming events you have.

Weekly View - This view is intended as more of an agenda-type view, showing all appointments that occur during a specific week.

Daily View - The daily view is a planner-type view that shows all events during a day and also visually indicates when events overlap each other.

Calendar Controls

The right side of the page shows you both the current month and next month, and indicates days where events are scheduled with bold font in a different color. A legend below the calendars shows what different colors and effects mean.

Changing the month or year on the right calendar will not affect the calendar on the left. This is intended so you can look through a month (and the month after it) without affecting your currently selected timeframe.

Clicking on the double arrow next to the day indicators in the calendar will make the displayed month the currently selected month and put the calendar into the Monthly view.

Selecting the single arrow next to a week will select that week and change the display to the weekly view.

Clicking on a day in the calendar will make that day the selection and change to daily view.

Monthly, Weekly, and Daily View

The calendar view in the center of the page will change depending upon your date selection, as indicated above. These different views show data differently, but operate in the same manner.

Prev and Next - Click these buttons to quickly select the next month, week, or day (depending on your current view mode).

Adding an Appointment - Click on the New Appointment button to start a new appointment. For more information, please refer to the help topic [Adding an Appointment](#) .

Editing an Appointment - Click on an appointment to edit its content.

Deleting an Appointment - To delete an appointment, click on it, then click on the Delete button.

Add to Outlook (Enterprise Edition Only) - Click this button to attach to this calendar from within Microsoft Outlook. For more information, please see Integration with Outlook .

Sharing (Enterprise Edition Only) - Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share your calendar with another user on your domain. It is described in further detail in the topic Sharing Your Own Resources .

Inviting Attendees

You may need to coordinate an appointment with one or more other attendees. To do this quickly and easily, use the Invite Attendees button when adding or editing an appointment. Enter email addresses in the box to invite those people to your appointment. In addition, you can click on the attendees link to pop up a window that lets you quickly add members of your contact list or Global Address List (Enterprise Edition Only) .

Once you save your appointment, the attendees will receive an email invitation to the event. If they accept, you will receive a notification back. Additionally, if they accept from within SmarterMail, the event will get added to their calendar as an appointment.

Availability

This feature is available in Enterprise Edition only
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If attendees you are inviting have chosen to share their calendar with you, you can see their availability chart by clicking on the availability link.

Recurring events

SmarterMail's calendaring allows you to add events that recur over time. Recurring events can include:

- Holidays
- Birthdays
- Anniversaries
- etc.

When adding an appointment (see Adding an Appointment), it can be converted to a recurring event by clicking on the Recurrence Information tab. Use the options on the tab to schedule how often an event recurs. Recurrence is very flexible, and can be as simple or as complex as you want. Examples include:

- A birthday that occurs every 7th of August.
- A meeting that happens the second Monday of every month.
- An appointment that occurs every 4 days for up to 3 weeks.

Reminders

Reminders may be added to appointments in calendaring by setting the reminder drop-down box to a value other than None. When a reminder is activated, a sidebar item on the left will appear that reminds you of the event. By clicking on this sidebar item, you can dismiss the item or use snooze to bring up the reminder later.

You can also choose to activate an email reminder to send an email when the reminder activates. This can be your own email address, or can optionally be an alternate email address, like a cell phone SMS or pager email address.

Integration with Outlook

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

To enable the connection, you must first have Outlook installed and available to your user account.

- In SmarterMail, navigate to the calendar or contact list you wish to connect.
- Click on the Add to Outlook button.
- A popup window will appear with additional instructions. Click OK to initiate the connector.
- A security popup will appear from Outlook, explaining that an external source wants to attach to Outlook. Click on Yes to allow the connector to attach.
- The resource is now available in Outlook.

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

Contacts

Contacts Overview

SmarterMail allows you to keep not only the email addresses of all of your important contacts, but all of their other information as well. All contact information, like all features of SmarterMail, is

accessible through the web interface from anywhere on the internet. Some features of Contacts in SmarterMail include:

- Contact lists can be imported to, and exported from, SmarterMail in multiple formats.
- Quick-add contacts to emails.
- Easy searching of contacts.
- Integration with Outlook (Enterprise Edition Only) .

To get started, click on the My Contacts link under the Contacts sidebar item.

Adding a Contact

Select New Contact from Contacts in the left sidebar 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 My Contacts page or any shared contact list (Enterprise Edition Only) .

For ease of use, the contact page is separated into tabs that group related information. This information is outlined below.

Personal Info

- Display As
- Full Name Note: Use the advanced link to allow entry of individual name parts.
- Other Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers
- Fax Numbers
- Address Information

Company Info

- Name
- Job Title
- Department
- Office

- Address Information
- Website

Categories

- Select which category or categories you would like to add this contact to
- To add a category simply click the Master Categories button and add comma(,) separated categories to the list

My Contacts

The My Contacts page lists all of your contacts and lets you perform many actions, like searching or composing new email. View your contacts by clicking on My Contacts under the Contacts tree in the sidebar.

Adding a Contact - Click on the Add Contact button to add a new contact. For more information, see the topic [Adding a Contact](#) .

Editing a Contact - Click on the name of a contact to edit it.

Deleting a Contact - To delete a contact, click on the delete link next to it, or check the contacts you want to delete and choose Delete Selected Contacts.

Searching Contacts - Click on the Search button to begin searching for contacts. A second bar will appear that will allow you to search.

Sending an Email to a Contact - Click on the new message link next to a contact to send them an email, or choose multiple users and choose New Message to Selected Contacts from the Actions menu.

Exporting Contacts - For information about exporting contacts, see [Exporting Contacts](#) .

Importing Contacts - For information about importing contacts, see [Importing Contacts](#) .

Integrating with Outlook (Enterprise Edition Only) - If you have Enterprise Edition, you can use SmarterMail as a connector to Outlook so that your contacts in SmarterMail appear in Outlook and are automatically synchronized. For more information, please refer to the help topic [Outlook Integration](#) .

Sharing Contacts with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic [Sharing Your Own Resources](#) .

Global Address List

This feature is available in Enterprise Edition only
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The Global Address List, sometimes referred to as "GAL", is a dynamic list containing all users on your domain. The Global Address List can be managed by your domain administrator in order to hide users that may not represent real people (like support@example.com, for example).

Contact information for the Global Address List is pulled from individual profiles of users. To update your listing, go to the Settings menu and choose My Profile.

Note: All information you enter into your profile can be seen by all other members of your domain.

The Global Address List functions in a way almost identically to My Contacts. For information about using the page, see the help topic Adding a Contact .

Exporting Contacts

Contacts can be exported in an easy fashion in SmarterMail. When viewing a contact list like My Contacts or the Global Address List (Enterprise Only) , click on the Actions menu and choose to export all contacts, or just the selected ones.

Contacts are downloaded as a zip file containing vCard files. These files can be imported into Outlook or back into another SmarterMail account using Import Contacts .

To import contacts into Outlook, just drag one or more vCard files into your contact list in Outlook and confirm each one by clicking on Save and Close for each one.

Importing Contacts

SmarterMail supports importing contacts from two different types of files: vCards (VCF) and comma-separated text files (CSV). SmarterMail also supports importing from a .zip file containing any combination of these files.

Importing vCard or zipped vCard files

- Go to My Contacts.
 - Click on the Actions menu and choose Import Contacts.
 - Link to the file you wish to upload and click on OK.
 - If any conflicts occur, you will be asked to resolve them by performing one of the actions below:
 - Add as a New Contact - As it states, this option adds a completely new contact record with the information in the vCard.
 - Replace Existing Contact - Replaces the contact in the box with the new one being uploaded.
- To examine the properties of the close match contacts, hover your mouse over the magnifying

glass icon in the list at the bottom of the page.

- Skip this Contact - Jumps over this contact and does not perform an action.
- Once all conflicts are resolved, the process is complete.

Importing CSV or zipped CSV files

- Go to My Contacts.
- Click on the Actions menu and choose Import Contacts.
- Link to the file you wish to upload and click on OK.
- Map the contact fields from your CSV to SmarterMail fields by choosing them from the dropdown boxes.
- If any conflicts occur, you will be asked to resolve them by performing one of the actions below:
 - Add as a New Contact - As it states, this option adds a completely new contact record with the information in the vCard.
 - Replace Existing Contact - Replaces the contact in the box with the new one being uploaded. To examine the properties of the close match contacts, hover your mouse over the magnifying glass icon in the list at the bottom of the page.
 - Skip this Contact - Jumps over this contact and does not perform an action.
 - Once all conflicts are resolved, the process is complete.

Integration with Outlook

This feature is available in Enterprise Edition only

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- A popup window will appear with additional instructions. Click OK to initiate the connector.
- A security popup will appear from Outlook, explaining that an external source wants to attach to Outlook. Click on Yes to allow the connector to attach.
- The resource is now available in Outlook.

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

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 email accounts can use.

Start date - The date that you want the report to start calculations. Clicking the calendar icon will pop up a calendar to help make choosing the correct date easier.

End date - The date that you want the report to end. Clicking the calendar icon will pop up a calendar to help make choosing the correct date easier.

Generate report - Clicking on this button will generate the report, which causes the items below to be calculated and displayed.

Report Fields

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

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

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.

Junk E-Mail - The current amount of disk space used by the Junk E-Mail folder.

Deleted Items - The current amount of space used by the Deleted Items folder

RSS Feeds

RSS Feed Overview

SmarterMail's web interface contains a sophisticated news feed aggregator. Using the RSS tree, found in the folders tab on the sidebar, you can add feeds to keep an eye on. Some of the features of SmarterMail's RSS capabilities are:

- Supports RSS, RDF, Atom Feeds.
- Bolds the feed name to indicate that new articles are available for viewing.
- Downloads feeds in the background and shares feed information between users that connect to common feeds.

Adding a Feed - Click on New RSS Feed under the RSS Feeds tree to begin adding an RSS feed. See the help topic Adding an RSS Feed for more information.

Editing a Feed - Click on a feed and then use the Edit Feed button to edit the RSS feed

Deleting a Feed - Click on a feed and then click on Edit Feed. From this page you can click on Delete to remove the feed from your list.

Adding an RSS Feed

To add an RSS feed, click on the New RSS Feed link under the RSS Feeds tree in the folders tab on the sidebar. Adding a feed requires two pieces of information:

Name - Enter a friendly name for the feed. Typically, you'll want to make this a short name so you can easily find it. You can use a backslash character to make the feed appear in a subdirectory, such as in News\Fox News or Technology\Microsoft Updates.

URL - The feed URL must be entered exactly as it is written in the web site you want to track. Some sites do not offer RSS, and those that do usually have a link from their web site to the RSS feed.

Some sample RSS feeds can be found in the help topic Sample Feeds .

Sample Feeds

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

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

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

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

My Settings

The options in the My Settings page allow end users to customize the way SmarterMail works. No changes are saved until you click on the Save button. The options are each explained below, separated by the tab on which they reside.

Mailbox

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

Current Password - If you wish to change your password, enter a new password in the space provided.
Note: If you do not wish to change your password, you may leave the password fields blank.

New Password - The Password you would like to become your new password.

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

Display 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.

Time Zone - Choose the time zone that you wish to use in SmarterMail. Daylight Saving Time is automatically managed by SmarterMail.

Bypass Greylisting - Check this box if you wish to disable greylisting spam filtering for your mailbox. Greylisting is an effective anti-spam method but does have possible disadvantages.

Forwarding

Forwarding address - If you wish to send copies of all incoming mail to a different email address(es), enter that address(es) 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. To forward emails to multiple addresses, simply add a semicolon after each email address.

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.

Webmail

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.

Show Preview Pane - When this is checked a preview panel will display at the bottom of the message list that will show you the message before double clicking it to view it in a full screen. This may not work as well on older computers, or on certain browsers like Opera, Safari, or IE for Macs.

Scroll Long Menus - Certain drop down menus, such as Move, can grow rather long making it difficult to view all the menu items. Selecting the Scroll Long Menus checkbox will cause the possible

options to display in a scrollable list. De-selecting this checkbox will cause the available options to display as one long continuous list even if the list length exceeds the available display area.

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

Auto 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 Format - 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.

- 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.
- 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.

Delete Action - 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.
- Auto-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.

Initial Page on Login - Choose which page you would like to see upon first logging in.

- My Today Page - Gives you a nice overview of current items in your mailbox, RSS feeds, Calendar Items, etc.
- My Inbox - Takes you directly to your Inbox

Skin - If the domain administrator allows users to change skins, select the skin you would like to use from the drop down list.

Compose

Spell Check Dictionary - Choose from any of the dictionaries that the administrator has installed on the server, or choose to auto-detect which dictionary to use from your browser's language setting.

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

- HTML - Use this option if you wish to add stylistic elements to your emails.
- 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.

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.

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. Basic headers include From, To, and Subject headings whereas the full header includes MIME type filter restrictions, etc.

Reply Text 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.

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.

Plus Addressing

Plus Addressing is feature that allows you to automatically filter incoming email into folders without pre-creating the folders or filters to deal with them. A detailed description of this feature can be found in the topic Using Plus Addressing .

Plus Addressing Enabled - Check this box to turn on this feature. If this feature is disabled, the email will NOT be accepted.

Action - When a plus addressed email comes in, SmarterMail can act on it in several ways. See the list below for a description of each:

- Move to folder - If the target folder exists, the incoming message will be placed into it. If the folder does not exist, it will be created. No more than 10 folders can be auto-created in this method during a six hour period to prevent abuse.
- Move to folder (if it exists) - If the target folder exists, the incoming message will be placed into it. Otherwise, the email will get placed in the Inbox.
- Leave in Inbox - Drops the message into your Inbox.

My Profile

Your profile is your public contact information to others in your domain when they access the Global Address List through the web mail or through LDAP. Note: LDAP only supported on Enterprise Edition.

For ease of use, your profile has been separated into tabs that group related information. This information is outlined below.

Personal Info

- Display As
- Full Name Note: Use the advanced link to allow entry of individual name parts.
- Other Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers
- Fax Numbers
- Address Information

Company Info

- Name
- Job Title
- Department
- Office
- Address Information
- Website

My Auto Responder

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

Options

Enable Auto-Responder - This check-box allows you to quickly turn the auto-responder on or off. If the auto-responder is disabled, the Auto-Responder Message tab will not be enabled.

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 a particular address sends to will get responded to. It is HIGHLY recommended that you keep this option turned on to avoid the potential of your email address, your domain, or even potentially your entire mail server from becoming blacklisted by an ISP.

Auto-Responder Message

Note: This tab will only be enabled if the auto-responder is enabled.

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

HTML or Plain Text - Determine whether you want to compose your auto-responder in plain text or HTML.

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. For example, you can use content filters to delete messages with certain attachments, forward emails from a specific email address to another account, or even alter the subject of specific types of email. Content filtering is very open ended, in order to allow you to filter the way you want to.

Adding a Filter - Clicking the Add Filter button starts the Content Filter Wizard which is explained in more detail below.

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

Deleting a Filter - Click on the delete link next to a filter to delete it. No confirmation dialog will be shown.

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

Changing Filter Order - Content filters are executed in the order in which they show up in the list. When a content filter gets triggered and performs an action, no other content filtering is performed on that message. To change the order, click on the arrows next to a filter.

Content Filter Wizard

The 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 one criteria to be met from each and every section, or just one of the criteria in any section to be met, before an action is performed. Then choose whether you will be using any wildcards in your search strings. Usually, wildcards will not be necessary, but there are times when some people may want them.

For each of the criteria you chose in step 1, you will be able to enter details. Many types of content filters allow lists of items to be entered in, and these will be indicated. For example, if you chose to

filter on From Address, you can enter multiple email addresses in the box (one per line) and if a message is from any of them, that criteria will be met.

You also have the ability to reverse the logic of a specific criteria item by changing the "matches" box to "does not match."

Step 3 - Rule and Actions

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

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. Note: If the system administrator has disabled bouncing, this option will function the same as the delete action.
- Move message to folder - Delivers the incoming message to the folder you choose from the drop-down list. If you later delete that folder and leave the content filter active, the filter will automatically create the folder when the action is triggered.
- Prefix subject 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"
- Copy message - Forwards a copy of the message to another email address and leaves a copy of the message in your account as well.
- Reroute message to another email address - Forwards the message to another email address instead of this one. Will not store a copy of the email in your own account.

Content Filter Types

- From Address
 - From specific addresses
 - From specific domains
 - From trusted senders
 - 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

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.

Options

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

Actions

If you are using the default spam options that were set up by your administrator, they will appear on this tab.

In the case that you have chosen to override the settings, the following possible actions appear for each spam probability.

- No action
- Delete message
- Move to Junk E-Mail folder
- Add text to subject line - A Text box will appear where you can specify the text you would like appended to the subject.

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. Normal content filtering rules are still followed, however.

Any emails that you "unmark as spam" will add the sender to your trusted senders list automatically.

POP Retrieval

Pop Retrieval, if made available by the System Administrator, allows users to access email on another server through the SmarterMail Web interface, so their messages can be stored on a local mail server.

When creating a new POP account, users also have the option to select the Secure Socket Layer (SSL) checkbox for mail servers that require SSL. Two widely known SSL mail servers are Yahoo, and Gmail.

Shared Objects

Shared Objects Overview

This feature is available in Enterprise Edition only

SmarterMail allows you to share resources like calendars with other users of your domain. The types of items that can be shared include:

- E-Mail Folders
- Contacts
- Calendars
- Task Lists

For information about allowing others to view or edit your resources, please refer to the help topic [Sharing Your Own Resources](#) .

To learn how to connect to another user's shared resource, see [Opening Shared Resources](#) .

Sharing Your Own Resources

This feature is available in Enterprise Edition only

Sharing a resource, such as a calendar or e-mail folder, will allow the users you specify to access the resource with a pre-determined permission level.

To share a resource (in this example your calendar), follow the steps below:

- Navigate to the settings menu and click on My Shared Resources
- Click on the Add Share button.
- Select the Item or folder you would like to share and click Next.
- Select who you would like to Share with
 - User - A user is a single person on your domain.
 - Group - A group is a set of users that fall under a similar department, permission level, or role. Your domain administrator can add and modify these user groups.
- Choose an access level:
 - None - This resource is not shared with the user. This setting is useful if you give permissions to a group but want a specific user to be denied permission.
 - Availability-Only (Calendars only) - This setting is used to show availability for you if the user clicks on the availability link when adding a calendar item. Other than this functionality,

the calendar acts as if it is not shared.

- Read-Only - Grants view access to the resource, which lets the other user see your information, without granting any permission to change or modify the resource in any way.
- Full Control - The user that has this permission can do everything on the resource that you can, including moving items, changing things, and even deleting information.
- Save the user or group and repeat the process as needed. More than one user can be added at a time by putting each username on a separate line.

Note: The steps are very similar for each of the resource types. Just make sure you are viewing the resource you want to share when you click on the Sharing button.

Once you have shared the resource, the other users can connect to it by using the procedures in the help topic [Opening Shared Resources](#) .

Opening Shared Resources

This feature is available in Enterprise Edition only

SmarterMail allows you to connect to resources (calendars, e-mail folders, etc) that have been shared to you by other users on your domain. To connect to a shared resource, perform the following steps:

- In the settings menu, click on My Mapped Resources
- You will be presented with a list of all currently attached resources.
- Click on the Attach to Resource button.
- You can search for resources by name, or find one in the list and click on the attach link next to it.
- Enter a friendly name for the resource and click on Save

The resource will now be available in the sidebar.

If you wish to detach from a resource, go into Open Shared... and click on the detach link next to the item.

Tasks

Task List Overview

SmarterMail allows you to store all of your tasks in a single place, accessible from the web wherever you are. Tasks can be used to store to-do's or important checklists. Some features of SmarterMail tasks are:

- Configurable start and due times.
- Reminders that show up in SmarterMail to alert you of the task due date.
- Completion status that tracks the percent done of the task.

To get started with tasks, click on the New Task link under the Tasks tree on the sidebar.

Adding a Task

To add a task to your task list, click on New Task when viewing your tasks, or from the sidebar.

If you wish to add a task to a shared task list (Enterprise Edition Only) , you must be viewing the list, then use the New Task button from within the page.

- Subject - This is the short description of the task, and is what will appear on task pages and reminders.
- Date and Time - Enter the start date and time of the task, as well as the due date of the task. You may leave the due date or time blank to indicate that there is no due date.
- Reminder - If you wish to have a reminder appear in SmarterMail, choose the amount of time beforehand that you want it to show.
- Status - Choose the status of the task. This will show up in My Tasks so that you can easily track the status of your items.
- Priority - Higher priority tasks are more important. In My Tasks, you can sort by priority.
- % Complete - This indicates the percentage that the task is completed.
- Task Description - Enter the full description of the task, if needed.

My Tasks

The My Tasks page lists all of your tasks in one place and lets you sort and track them easily. View your tasks by clicking on My Tasks under the Tasks tree in the sidebar.

Adding a Task - Click on the New Task button to add a new task item. For more information, see the topic Adding a Task .

Editing a Task - Click on the subject of a task to edit it.

Deleting a Task - To delete a task, click on the actions popup menu next to it and choose Delete.

Changing Status or % Complete - To quickly change the status of a task, click on the actions popup menu next to it and choose the appropriate option.

Sharing Tasks with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic Sharing Your Own Resources .

Notes

Notes Overview

SmarterMail allows you to store all of your notes in a single place, accessible from the web wherever you are. Notes can be used to store to-do's or important checklists. Some features of SmarterMail notes are:

- Several fun colors to choose from
- The ability to assign a category to a note

To get started with notes, click on the New Note link under the Notes tree on the sidebar.

Adding a Note

To add a note to your note list, click on New Note when viewing your notes, or from the sidebar.

If you wish to add a note to a shared note list (Enterprise Edition Only) , you must be viewing the list, then use the New Note button from within the page.

- Color - Choose a color to make this note. You may wish to assign colors based on urgency or however you wish to color code.
- Note - The actual body of the note.
- Categories - You may assign one or more categories to each note to make for easier searching.

My Notes

The My Notes page lists all of your notes in one place and lets you sort and track them easily. View your notes by clicking on My Notes under the Notes tree in the sidebar.

Adding a Note - Click on the New Note button to add a new note item. For more information, see the topic Adding a Note .

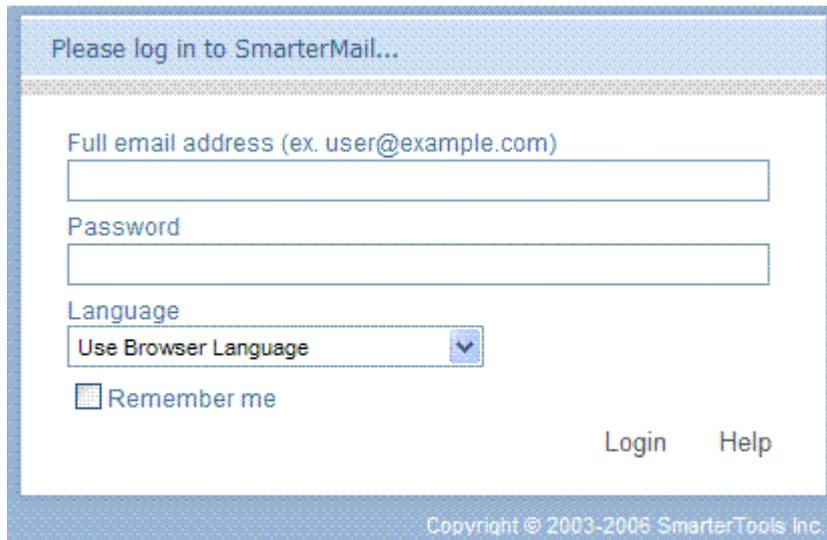
Editing a Note - Click on the subject of a note to edit it.

Deleting a Note - To delete a note, click on the actions popup menu next to it and choose Delete.

Sharing Notes with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic Sharing Your Own Resources .

Logging in to SmarterMail

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

The image shows a screenshot of the SmarterMail login interface. At the top, a blue header bar contains the text "Please log in to SmarterMail...". Below this, the form is white with a blue border. It contains four input fields: "Full email address (ex. user@example.com)", "Password", "Language" (a dropdown menu currently showing "Use Browser Language"), and a "Remember me" checkbox. At the bottom right of the form are two buttons: "Login" and "Help". At the very bottom of the page, a small copyright notice reads "Copyright © 2003-2006 SmarterTools Inc."

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. Alias names cannot be used to log in.

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.

If you have issues with your email account, first contact your domain administrator for troubleshooting help. The Domain Administrator is usually the owner of the domain or the person who set up your email account.

Welcome to SmarterMail

The first time you log in to SmarterMail, you will be presented with several options. These options can be modified at any time through the My Settings page once you are logged in, but are required to be set in order to provide you with a better email experience.

Time Zone - Setting your time zone will make it so that all emails show the correct time they came in. SmarterMail automatically adjusts for Daylight Saving time. By default, this should be set to the time zone that your domain administrator has chosen.

My Today Page

The My Today page gives you an overview of your entire account.

Calendar - lists upcoming events on your calendar.

Latest RSS Items - list recent updates to RSS feeds you are subscribed to.

Inbox - lists how many unread messages you have.

Disk Space Limits - lists how much space is available and how much space is being used in your account. Press the "Clear Junk E-Mail Folder" link to remove all items from your Junk e-mail box.

Tasks - lists unfinished tasks.

The My Today page is the default page to load when logging into your account. If you would rather go straight to your Inbox you can change it by going to Settings|My Settings|WebMail and changing the "Initial Page on Login" setting.

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 is taken on deleted items. 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 correct 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. Lastly, try using your full email address instead of just your username. If those options fail, please contact your hosting company or email administrator to have your password changed.

[Help for Domain Admins](#)

[Domain Settings](#)

[Default User Settings](#)

Default user settings apply to all new email users added in your domain. Editing the default settings does not change users that are already in place in your domain.

The Default User Settings are almost identical to those found when adding a user. For more information about what each one does, please refer to the help topic [Adding a User](#) . For information about the new Skin tab please see below.

[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 by end users. 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.

SpamAssassin

The SpamAssassin weights can only be changed at the system administrator level. If you would like to change these weights, we recommend getting together with your system administrator and working out an agreeable anti-spam strategy.

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.

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 address 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 Folder Auto-Clean

Domain 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 domain accounts do not fill up unnecessarily. Oldest messages will be deleted from the folders first. If you override the auto-clean settings, the settings you choose will trickle down to your users.

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.

Options

Use default auto-clean settings - Choosing this option will let you adopt the policy of your system administrator. If the administrator changes the policy, yours will automatically change with it. You can see the current policy on the Folders tab when this option is active.

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 overrides.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, you will be shown them on this tab.

In the case that you have chosen to override the 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.

Manage

Email 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.

Managing Users

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

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

Edit a User - Edit an account by clicking on the username of the account in the table.

Deleting a User - To delete an account, click on the delete link next to the user's name. Note: Deletions are permanent, and once a user 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 Users page. When you do so, you will be presented with a page that contains the items below, separated into tabs for easy editing. 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.

Mailbox

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

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.

Display Name - Enter the name of the person using the email account.

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.

Time Zone - Choose the time zone that you wish to use in SmarterMail. Daylight Saving Time is automatically managed by SmarterMail.

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

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.

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.

Hide from Global Address List (Enterprise Edition Only) - Enabling this option will remove the user account from the Global Address List. Use this option on accounts that are not tied to real people, like support@example.com.

Enable POP retrieval - Enabling this option will allow the user to pull their messages from a remote mail server into their account using POP.

Forwarding

Forwarding address - If you wish to send copies of all incoming mail to a different email address(es), enter that address(es) 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. To forward emails to multiple addresses, simply add a semicolon after each email address.

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.

Webmail

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.

Show Preview Pane - When this is checked a preview panel will display at the bottom of the message list that will show you the message before double clicking it to view it in a full screen. This may not work as well on older computers, or on certain browsers like Opera, Safari, or IE for Macs.

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

Auto 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 Format - 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.

- 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.
- 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.

Delete Action - 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.
- Auto-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.

Initial Page on Login - Choose which page you would like to see upon first logging in.

- My Today Page - Gives you a nice overview of current items in your mailbox, RSS feeds, Calendar Items, etc.
- My Inbox - Takes you directly to your Inbox

Skin - If the system administrator allows domains to change skins, select the skin you would like to set for this user's default from the drop down list.

Compose

Spell Check Dictionary - Choose from any of the dictionaries that the administrator has installed on the server, or choose to auto-detect which dictionary to use from your browser's language setting.

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

- HTML - Use this option if you wish to add stylistic elements to your emails
- 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

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.

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 Text 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.

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.

Groups

This feature is available in Enterprise Edition only
--

Check all of the user groups that this user belongs to. These groups are used for permissions in shared objects and the Global Address List.

Two user groups are pre-defined. These are "Everyone" which contains every user in the domain, and "Administrators" which contain all users marked as domain administrators for the domain.

Plus Addressing

Plus Addressing is feature that allows you to automatically filter incoming email into folders without pre-creating the folders or filters to deal with them. A detailed description of this feature can be found in the topic [Using Plus Addressing](#) .

Plus Addressing Enabled - Check this box to turn on this feature. If this feature is disabled, the email will NOT be accepted.

Action - When a plus addressed email comes in, SmarterMail can act on it in several ways. See the list below for a description of each:

- Move to folder - If the target folder exists, the incoming message will be placed into it. If the folder does not exist, it will be created. No more than 10 folders can be auto-created in this method during a six hour period to prevent abuse.
- Move to folder (if it exists) - If the target folder exists, the incoming message will be placed into it. Otherwise, the email will get placed in the Inbox.
- Leave in Inbox - Drops the message into your Inbox.

Email 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 Aliases

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

Add Alias - Similarly to adding a user, clicking this button will allow you to add a new user alias. More information about adding aliases 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. Note: The system administrator may have disabled catch-all functionality.

Edit an Alias - Edit an alias by clicking on the name of the alias in the table.

Deleting an Alias - To delete an alias, click on the delete link next to the alias name.

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 Aliases 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(one per line) of the users who should receive the mail sent to the alias.

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.

User Groups

This feature is available in Enterprise Edition only
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User groups are used to give permissions to specific subsets of users on the domain to access shared resources. By default, SmarterMail starts with the two user groups below which are considered "special" groups and thus cannot be edited.

- Everyone - All users on the domain belong to this group automatically.
- Administrators - All users that are marked as domain administrators for this domain belong to this group.

User groups are used when setting up permissions to shared resources.

[Mailing Lists \(List Serv\)](#)

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 Domain 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 Settings page. More information can be obtained in the help topic List Settings .

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.

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.

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 List 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

Actions Menu

- List Settings - This item has the same effect as clicking on the list name. It will allow you to edit the settings of a list. For more information, see the help topic List Settings .
- List Subscribers - Subscribers are those email addresses that will receive copies of every email posted to the list. For more information, see the help topic List Subscribers .
- Digest Settings - Digest mode settings can be modified from here, including how frequently list digests are sent. For more information, see the help topic Digest Settings .
- Digest Subscribers - The digest equivalent of Subscribers. For more information, see the help topic more info .
- Poster Whitelist - Email addresses entered into the poster whitelist may post to the list in addition to those defined in General Settings. For more information, see the help topic Poster Whitelist and Blacklist .
- Poster Blacklist - Email addresses in the poster blacklist will not be permitted to post to the list. For more information, see the help topic Poster Whitelist and Blacklist .
- Subscription E-Mail - The contents of the subscription email are sent to new subscribers. For more information, see the help topic Subscription E-Mail .
- 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 email is sent to the user. For more information, see the help topic Help E-Mail .

List Settings

The list 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).

Allowed Posters - 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 setting 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 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 poster whitelist - Anyone added to the Poster Whitelist will be able to post if this option is enabled. The Poster Blacklist is always enabled.

Send Subscribe Email - Check this option to send an email in response to new subscriptions performed through list serv commands.

Send Unsubscribe Email - Check this option to send an email in response to unsubscribe requests performed through list serv commands.

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 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 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.

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.

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 actions pop-up menu on the Mailing Lists page. You will also need to enable the header or footer on the List Settings tab.

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

List Subscribers

List subscribers are those email addresses that will receive list posts. To modify the subscribers for a mailing list, choose List Subscribers from the Actions 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.

Actions menu - Use this menu to perform functions to upload and download the list.

- **Download** - Downloads the list as a text file, with one line per email address.
- **Upload** - Use this option to upload a list file to the server. This file must be in .txt format with one line per email address
- **Delete All** - Deletes all email addresses in the list. A confirmation dialog will appear. Once you have deleted the addresses, 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.

Search - Use the search button to find a specific email address in the list quickly.

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.

Send Digest As - Change this to determine what type of email will get sent with the digest. Digests can be sent as plain text to conserve space, or as HTML to preserve formatting of the posts.

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 in the digest unless the options are checked.

Digest Headers and Footers

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 tab. The digest email is formatted as shown below.

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

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 actions 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.

Actions menu - Use this menu to perform functions to upload and download the list.

- **Download** - Downloads the list as a text file, with one line per email address.
- **Upload** - Use this option to upload a list file to the server. This file must be in .txt format with one line per email address.
- **Delete All** - Deletes all email addresses in the list. A confirmation dialog will appear. Once you have deleted the addresses, 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.

Search - Use the search button to find a specific email address in the list quickly.

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 Allowed Posters 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 many email addresses to the list. Ensure that you enter one email address per line when adding them. Duplicates will not be added.

Actions menu - Use this menu to perform functions to upload and download the list.

- Download - Downloads the list as a text file, with one line per email address.
- Upload - Use this option to upload a list file to the server. This file must be in .txt format with one line per email address
- Delete All - Deletes all email addresses in the list. A confirmation dialog will appear. Once you have deleted the addresses, 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.

Search - Use the search button to find a specific email address in the list quickly.

Subscription E-Mail

The subscription e-mail 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 Subscription E-Mail from the actions pop-up menu on the Mailing Lists page.

Help E-Mail

The help e-mail is sent 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 e-mail contains the list of appropriate commands that the person can use with the list.

To edit the help file, choose Help File from the Actions 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 E-Mail 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 List 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 List 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.

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 (KB).

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 My 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.

[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. In general, however, use of a catch-all alias is not recommended , as it makes you more prone to harvesting attacks.

To set a catch-all alias, first create an alias in your domain to be the catch-all. Then go to the Email Aliases 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. If you do not see the option for adding a catch-all, please contact your system administrator as they may have disabled the option.

[Help for System Admins](#)

[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.

Common Tasks

Add Domain - Click on Add Domain to begin the Add Domain 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 the Edit Domain option from a domain's actions menu to edit the domain on that row. [more info](#)

Login to a Domain - Clicking on the name of a domain 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 domain-specific settings. [more info](#)

Delete a Domain - Click on the delete link next to a domain to permanently delete it. A confirmation dialog will appear to ensure that a domain does not get accidentally deleted. Please note that once a domain is deleted, the process cannot be reversed.

Actions Pop-up Menu

When you click on the actions link next to a domain, a pop-up menu will appear with various operations that can be performed for that specific domain. 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.

Edit Domain - Clicking on this option takes you to the domain setup page for the domain, allowing you to set options like ports and permissions. [more info](#)

Email Users - This choice lets you manage users in the domain. [more info](#)

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

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

Archive Messages - Archiving allows you to save all inbound and outbound messages for the domain for later retrieval. [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 domain.

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 a Domain

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 Domains page.

Adding a domain is a four page process (five on Enterprise Edition), 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 domain will not be saved until you click on the Save button on the final page.

Domain Information

Domain Name - Enter the full name of the domain (ex. [smartertools.com](#)). This domain name must match one that is registered with a DNS server in order to send or receive email. A domain alias for "mail.*" will be added for your domain automatically. So in most cases, use "example.com" instead of "mail.example.com".

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.

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

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 domain without deleting it.

Domain Admin Information

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.

Technical Information

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.

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.

LDAP Port Enterprise Edition Only - Lightweight Directory Access Protocol (LDAP) uses a default port of 389. If you would like to use a different port for LDAP 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.

Technical Options

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

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

Domain Features

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. [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.

Enable Active Directory Integration - Domains with this option enabled can add users that are bound to an Active Directory server, and authenticate against a domain.

Domain Limits

Note: Limits on total number of domains and users may be imposed by your SmarterMail license, which may override some options below.

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

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

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

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

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

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)

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

Domain Sharing

This page is available in Enterprise Edition only

Enable Shared Calendars - Allows calendars to be shared with other users of the same domain.

Enable Shared Folders - Allows email folders to be shared with other users of the same domain.

Enable Shared Tasks - Allows task lists to be shared with other users of the same domain.

Enable Shared Contacts - Allows contact lists to be shared with other users of the same domain.

Enable Global Address List - Allows users on a domain to see all other user profiles on the domain, and participate in LDAP queries against the domain.

Note: 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 configured, please refer to the topic Proper DNS Settings for Email .

[Return to Getting Started](#)

Editing Domains

Edit a domain by choosing Edit Domain from the action menu next to it in the Manage Sites page

Editing a site is very similar to adding a new site. To make the process quicker, the page has been separated into tabs. No changes will be applied on any page until the Save button is clicked.

- General
- Technical
- Features
- Limits
- Sharing (Enterprise Edition Only)

The following items appear under the General tab:

Domain Information

Domain Name - This displays the name of the domain you are editing. To change the name of a domain, click on the rename link, or use the Rename Domain item in the actions pop-up menu on the Manage Sites page. Clicking on the rename link will navigate away from the edit domain page. [more info](#)

Domain IP - From the drop down list, choose the IP address on which the domain will listen for incoming traffic. 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.

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.

Domain is Disabled - 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.

Primary Domain Administrator

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.

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, and is responsible for adding and deleting email accounts, and setting specific configurations for the domain.

Password - Enter the domain administrator 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.

Mailing List Settings

Username For List Commands - This is the email address that List Serv commands can be sent to via email. [more info](#)

The following items appear under the Technical tab:

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.

LDAP Port - Lightweight Directory Access Protocol (LDAP) uses a default port of 389. If you would like to use a different port for LDAP 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.

Technical Options

Require SMTP Authentication - Check this box if you want SMTP Authentication to be required by the end users of this domain. Each user must then supply an email address and password in order to send email from their account.

Restrict Autoresponders

Bypass Greylisting Bypass Forward Blacklist - Check this to allow forwarding to any domain, and to bypass any forwarding blacklist entries set at the system level. --%>

The following items appear under the Features tab:

Active Directory Integration - Domains with this option enabled can add users that are bound to an Active Directory server, and authenticate against a domain.

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. [more info](#)

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](#)

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

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](#)

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](#)

Pop Retrieval

The following items appear under the Limits tab:

Note: Limits on total number of domains and users may be imposed by your SmarterMail license, which may override some options below.

Domain Disk Space - The total amount of space, in megabytes, that SmarterMail 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)

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

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

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

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

Max Pop Retrieval Accounts

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)

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

The following items appear under the Sharing tab:

This page is available in Enterprise Edition only

Global Address List - Allows users on a domain to see all other user profiles on the domain, and participate in LDAP queries against the domain.

Shared Calendars - Allows calendars to be shared with other users of the same domain.

Shared Contacts - Allows contact lists to be shared with other users of the same domain.

Shared Folders - Allows email folders to be shared with other users of the same domain.

Shared Notes - Allows notes to be shared with other users of the same domain.

Shared Tasks - Allows task lists to be shared with other users of the same domain.

Troubleshooting a Domain

There are times when you will need to access domain specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to log in automatically as the domain administrator. This can be a useful method to examine domain settings or configure settings.

To impersonate a domain, go to the Manage Domains page and click on the name of the domain. 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 that needs to be changed.

For instructions on troubleshooting specific user accounts on a domain, please see the topic [Troubleshooting an Email Account](#) .

Troubleshooting an Email Account

SmarterMail now contains an easy method for the system administrator to troubleshoot email accounts. Using the user impersonation feature, the system administrator can quickly log into an account to change settings or diagnose problems with the user.

To impersonate a user, go to the Manage menu and choose Impersonate User . A new window will pop up, and will be logged in as the specified user. From there, you may edit user settings, content filters, or whatever other part of the account that needs to be changed.

For instructions on troubleshooting domain settings, please see the topic [Troubleshooting a Domain](#) .

Renaming a Domain

Renaming a domain is accomplished by using the Rename Domain option from the actions pop-up menu on the Manage Domains page. This method ensures that all items are correctly manipulated in SmarterMail and that the rename procedure completes properly.

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 an additional 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 actions 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, which means that 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.

Actions - 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.

Data Columns

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.

Spool Path - This shows which spool the message resides in. If you have subspools enabled, the message may be placed in one of those locations.

Action Pull-Down Menu

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. The statuses of the messages will not be updated until the server passes through the spool.

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.

Reset All Retries - Resets the retry counts on all messages in the spool, effectively starting the delivery process over. This can be useful if a DNS or firewall problem has been recently resolved, or if you are using SmartHosting and the target server was down.

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 that are currently stopped

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, while 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 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 from 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.

POP Retrieval - With POP Retrieval, mail is retrieved from external POP3 servers and saved in a mail box 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.

LDAP (Enterprise Edition Only) - Lightweight Directory Access Protocol is a communication protocol for accessing online directory services. Programs like Outlook and Thunderbird use LDAP to retrieve contact lists from SmarterMail.

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

Reports

Dashboard

The dashboard pages gives an overall look at system performance. Note this page is for display purposes only, no settings can be changed on this page.

Server tab shows you the percentage of CPU and the percentage of Memory being used by SmarterMail.

Usage - shows you the number of messages currently in the spool, the number of messages delivered in the last: 5 minutes, 24 hours, and since startup, plus a more detailed breakdown of your delivered messages. This page also displays the current number of active SMTP, POP, IMAP and WebMail threads.

Security - displays your outgoing spam blocking numbers, plus greylisting and virus statistics.

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.

LDAP Threads Enterprise Edition Only - the number of threads used for LDAP connections.

Messages in 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 Delivered - displays the total number of messages, both local and remote, that have been sent from the server.

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.

For more information, see the topic Abuse Detection .

Current Connections Report

The connections page shows all connections currently active in the SmarterMail service. These connections are broken down by the type of connection made: SMTP, POP, IMAP, or LDAP (LDAP supported in Enterprise Edition only).

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.

Disk Usage Report

The 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.

Bandwidth Report

The 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 Aliases Report

The domain alias report shows you a list of all domain aliases 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.

Custom Reports

The Custom Reports page allows you to create reports showing statistics of your SmarterMail server.

Add Report - click this button to create a report with up to 3 charts containing any of 24 statistics tracked by SmarterMail.

Email Reports

Use this page to have reports periodically E-Mailed.

Report Name - the name to give the report

Mail To - enter the email addresses to receive the report.

Reports - check the boxes of the reports that you want to include in the email.

Frequency - how often you want the report sent, Daily, Weekly or Monthly.

Settings

General Settings

The General Settings page is where you control many of the global settings for the SmarterMail server. This page is tabbed for easy editing. No settings will be saved until you click on the Save button.

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

Administrator

Username - This is the login name associated with the System Administrator account for the SmarterMail Server. You will use this name instead of a full email address when logging in as the System Administrator.

Old Password - In order to change the System Administrator password you must the current password associated with the System Administrator account. Passwords are case-sensitive.

New Password - Enter the desired password for the System Administrator account. Passwords are case-sensitive.

Confirm New Password - Verify the desired password for the System Administrator account.
Passwords are case-sensitive.

Server Info

Host Name - Enter the host name of this server. It is sent to connecting servers to identify the server.
Host names should be in the format `computername.domain.com` .

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

IP of Primary / Secondary DNS - Enter the IP address of the DNS servers. If left blank, the DNS server information will be pulled from the the Windows Networking settings (Recommended).

Security

Allow Relay - If you are concerned about spam mailers using the relay function to send mail through your server or do not want any other mail server to use your SMTP server as a gateway, you can set the type of relays you will allow, or completely disallow mail relay completely:

- 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 Users (Recommended) - Limits relay access to users (email accounts) for a valid domain on your SmarterMail Server.
- Only Local Domains - Limits relay access only to mail hosts (domains) on your SmarterMail Server.
- Anyone - Allows any other mail server to pass messages through your mail server, increasing the chances of your mail server being used for sending large volumes of messages with domains not associated with your local mail server. Selecting this option turns off statistics for all domains, due to the high amount of messages that are passed through the mail server with an open relay.

Auto Responders - 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.

Content Filter Bouncing - As with auto-responses, certain anti-spam organizations also blacklist those servers that send bounce messages back to spam trap accounts. SmarterTools recommends setting this option to be as restrictive as your clients will allow.

Catch-Alls - Check the "Enable bounces and auto-responders for email messages sent to catch-all accounts" 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.

Password Strength Requirements - The System Administrator is able to set the requirements for passwords and, as a result, all users must adhere to those standards. The password options available to the System Administrator are: minimum length, upper and lower case letters, numbers, and symbols.

Redirect Log Outs - This feature allows System Administrators to redirect users who log out to a certain URL. The redirect options available are:

- Redirect to Server URL on log out.
- Allow Domain Administrators to override the redirect URL

Spool

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.

SubSpools - Subspools allows SmarterMail to work around the NTFS limitation of 30,000 objects in an individual folder. SmarterMail will utilize subspools by allocating up to 10,000 messages per subspool.

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. Users can specify multiple retry times to resend emails before it is bounced. By default, this is set to 4 times - 15min, 30min, 60 min and 90 min.

Command-line file to run on new mail - 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.

Command-line 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.

Protocol Settings

This configuration page allows you to establish policies for the standard email protocols. This page is tabbed and no settings will be saved until you click on the Save button.

POP 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 terminated.

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

IMAP

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 terminated.

IDLE Command - Check this box to turn on IMAP IDLE. IMAP IDLE is an extension of the IMAP protocol that allows a mail server to send status updates in real time. Through IMAP IDLE users can maintain a connection with the mail server via any mail client that supports IMAP IDLE, allowing them to be instantly aware of any changes or updates. When enabled, SmarterMail will inform any connecting IMAP client that it accepts the IDLE command. Please note, IMAP clients that do not fully support IMAP IDLE, like Microsoft Outlook, may use the command in such a way that it actually degrades performance.

LDAP

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 Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization.

SMTP In

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 terminated.

Maximum Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. Max Hop Count - After a message gets delivered through this many mail servers, it is aborted by the software. This prevents looping due to DNS problems or misconfigurations.

Max Message Size - Messages greater than this size will be rejected by the mail server.

Max Bad Recipients - After this many bad recipients, the SMTP session will be terminated. This setting allows you to better protect yourself against email harvesting attacks. A value of 20 is recommended in most cases.

Submission IP:Port - The submission port is a special SMTP port that requires SMTP Authentication in order to be used to deliver any mail whatsoever, regardless of domain-specific settings. This setting is an advanced feature that is typically used when a whitelisted inbound gateway is being used for spam and virus scanning, and all other SMTP traffic is blacklisted. Note: This setting will not function until the Enabled checkbox next to the setting is 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 if the sender is authenticated.

Enforce SMTP authentication - When this option is enabled, SmarterMail will enforce SMTP authentication for all local deliveries. For example, mail from user1@example.com to user2@example.com must be authenticated even though the message is bound for local delivery.

SMTP Out 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. --%>

Outbound IP - Use this box to select what IP address is used to deliver outbound messages.

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.

Max Delivery Threads - Enter the maximum number of messages that can be sent at one time to email addresses that are not on the local server. If a message cannot be sent, the SmarterMail Server's multi-threading capabilities will move on to the next message and eventually get back to the one it skipped. This action can save tremendous amounts of time when compared to some other mail servers that stall the spool if a message can not be sent right away.

Hostnames

This feature allows Administrators to assign a hostname for each IP address. For example: IP 1.1.1.1 can be assigned to mail.domain1.com and IP 1.1.1.2 can be for mail.domain2.com. Prior to this addition, SmarterMail could only specify one hostname for all IPs.

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 Web Services. These default settings can be overwritten and are only intended to avoid needless data entry.

The settings on this page are identical to those found in the topic [Editing a Domain](#) .

Note: Changing these settings has no bearing on domains that have already been setup, unless the "Propagate Settings" option is used.

Propagating Settings

To apply some or all of the default settings to all domains on your server, change the settings to how you want them, and then click on the Save and Propagate Settings button. Check all of the settings that you want to apply to your domains, then click on the Propagate Now button.

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.

To make this page easier to use, it has been tabbed. Settings will not be applied to any tab until you click on the Save button.

Log Files

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.

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

Log Detail Levels

These settings change the amount of detail that is stored in the protocol logs. Possible values for each are shown below:

- Exceptions Only - Small size logs that record only errors.
- Normal - Medium size logs that record most activity taken on the mail server.
- Detailed - Very detailed logs that can get very large. Only enable this option when asked to by SmarterTools Support, or when troubleshooting server operations.

Note: More detailed logs require more disk space. If you choose a detailed log, you may want to enable the auto-delete setting on the Log Files tab.

Delivery Log Level - The log level for message delivery and spool operations (Default = Detailed).

SMTP Log Level - The log level for SMTP sessions (Default = Normal).

POP Log Level - The log level for POP sessions (Default = Exceptions Only).

POP Retrieval Log Level - The log level for POP retrieval sessions (Default = Exceptions Only).

IMAP Log Level - The log level for IMAP sessions (Default = Exceptions Only).

LDAP Log Level - The log level for LDAP sessions (Default = Exceptions Only).

Message-ID Log - The log level for logging Message-ID's of all messages sent to mailing lists. (Default = None).

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. If a delivery delay has been established for the server, messages are also delayed accordingly. This allows you to establish an incoming server that can run external virus or spam scanners, which can reduce the load on your existing network servers.

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.

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.

Gateway Servers

Gateway Servers allow you to use another server, SmarterMail or not, to handle outgoing mail in order to reduce load on your primary server. They can also be used to combat blacklisting. If the server gets blacklisted, simply rotate the primary IP on the network card to a different one to send out on the new IP.

- Add Gateway - Click this button to add a Gateway Server
- Server Address - The IP address of the Gateway Server
- Enabled - Whether this server should be enabled
- This gateway is a SmarterMail server - Is this gateway another SmarterMail server
- SmarterMail URL - The value to enter in this field is the URL used to check webmail. This

will allow the use of web services to find out how many messages are in the spool in order to do an intelligent round robin distribution.

- Admin Username - The admin username on the gateway server
- Admin Password - The admin password on the gateway server

Folder Auto-Clean

The purpose of the Folder Auto-Clean feature of SmarterMail is to aid you in keeping your mailbox size(s) 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 your mailbox. System administrators can choose to let domains and users override your suggested settings, or require them to use the policies you set. Domain administrators also have this privilege over users.

Options (System Admin)

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.

Options (Domain Admin)

Use default auto-clean settings - Check this box to use the system administration's auto-clean settings.

Override auto-clean settings for this domain - Check this box to allow you to change the settings for your domain.

Allow users to override auto-clean settings - Check this box to allow users to change the settings on for their individual account.

Options (Users)

Use default auto-clean settings - Check this box to use the domain administration's auto-clean settings.

Override auto-clean settings for this account - Check this box to allow you to change the auto-clean settings for your account.

Folders

Under each folder that has auto-clean options or if you click the Add Rule button, you will see the settings below:

Folder - Select the folder that you would like to add the Auto-Clean to. Only seen if you click the Add Rule button.

Auto-clean this folder - 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.

Message Archiving

This feature is available in Enterprise Edition only
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Message Archiving is a method of storing all email traffic for a domain in a separate location on the mail server. Typically, this is a feature used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002. Message archiving allows you to set up rules for saving messages for specific domains.

Note: Archives are not deleted by SmarterMail, and as a result they can get very large. Be sure to check your archive folders regularly to see if they should be backed up and removed from the hard drive.

Adding / Editing a Rule

To apply an archiving rule to all domains on the server, click on "All Domains" in the list. To add a rule for a single domain, click on Add Archive Rule.

Domain - The domain that should be archived, in the format of example.com.

Archive Path - The path on the hard drive that should be used to store the messages.

Rule - Choose to save all messages, or inbound / outbound messages only.

Skins

The SmarterMail Web interface contains built-in skins for your convenience. The various skins can be found under Settings > My Settings > Webmail. Users can also create custom skins to emulate their own style or that of their company. Please refer to the SmarterMail 4.x Skinning Guide for more information about creating custom skins.

Security

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.

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

ClamAV

Enabled - Check this box to use ClamAV anti-virus scanning.

IP Address - The IP address of the ClamAV server to use.

Port - The Port that the ClamAV server is listening on.

Virus Definitions - Displays when the virus definitions were last updated. The definitions are updated whenever the service starts and every 6 hours. Click the update link to do any immediate update.

Remote Server - This feature informs SmarterMail if the ClamAV it is connecting to is hosted locally or remotely. It also allows SmarterMail to simply pass a file name to local servers rather than the entire file.

Real-Time AV

Virus scanner stores files in a quarantine folder - 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 the 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.

Command Line AV

Enabled - Check this box to use a command line virus scanner.

Command Line - Enter the command that you want to execute. %FILEPATH will be replaced with the path to the file to be scanned.

Anti-Spam Administration

SmarterMail's anti-spam features allow you to be as aggressive as you want when combating spam. The Anti-Spam Administration page is separated into tabs to make configuring the system easier. These tabs are briefly explained below, with detailed explanations afterward.

- Spam Checks - Check the spam options that you want to enable for filtering (a point-based weighting system for filtering spam) and for blocking at the SMTP level. Weights can also be edited for the various checks from this tab.
- Filtering - Choose the default weight thresholds and actions for various spam levels for filtering. Users can override these settings if you permit them to.
- SMTP Blocking - Set the weight to use as a threshold on this tab. Enabling this option will block email at the SMTP delivery level if too many spam checks fail.
- Options - This tab contains options relating to the processing of spam and overridability.

In short, when an email comes in, spam checks are run on it. The checks that fail add points to the email, which then put the email into a category of spam probability.

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 the Filtering tab.

Note: Only enabled spam checks are used when calculating spam weight. To enable or disable a check, click on the appropriate checkbox next to it and click save.

The different types of Spam Checks are shown below. In most cases, clicking on the edit link will allow you to set various properties about it.

Declude

Declude integration allows you to use Declude products in conjunction with the SmarterMail

weighting system. Configuration of Declude is done through the Declude product, and all you need to do in SmarterMail is enable the spam check.

SpamAssassin

SmarterMail can use SpamAssassin with its weighting system. By default SpamAssassin will run on 127.0.0.1:783. Additional servers can be setup from the Security->SpamAssassin menu option.

Low Probability of Spam - The weight that will be assigned if SpamAssassin determines a low probability of spam.

Medium Probability of Spam - The weight that will be assigned if SpamAssassin determines a medium probability of spam.

High Probability of Spam - The weight that will be assigned if SpamAssassin determines a high probability of spam.

Timeout - The timeout that SmarterMail will impose on a server if it cannot connect.

Maximum Attempts per Message - This will designate how many times SmarterMail will attempt to acquire a SpamAssassin score before it gives up on that email.

Custom Headers

Email can be assigned spam weight based on headers in the message. Use this selection to configure weights for custom headers.

Header - The custom header to search for in the e-mail message.

Value - The value of the custom header.

Weight - The amount to add to the e-mail message's spam weight.

Bayesian Filtering

Bayesian Filtering uses statistical analysis to identify whether or not an email appears to be spam. Tying it together with blacklists and SPF allows you to be quite sure that email is or is not spam.

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.

SPF (Sender Policy Framework)

SPF is a method of verifying that the sender of an email message went through the appropriate email server when sending. As more and more companies add SPF information to their domain DNS records, this check will prevent spoofing at an increasing rate.

Pass - 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 there is a syntax error in the SPF record. Since SPF is relatively new, some domains have published improperly formatted SPF records. It is recommended that you leave this at 0 until SPF becomes more popular on the internet.

None - Indicates that the domain has no published SPF record. Since SPF is relatively new, many legitimate domains do not have SPF records. It is recommended that you leave this at 0 until SPF becomes more popular on the internet.

Reverse DNS

Reverse DNS checks to make sure that the IP address used to send the email has a friendly name associated with it.

Weight - The default weight for this spam check. If an email sender does not have a reverse DNS entry, this is the value that will be added to the message's total spam weight.

RBL Lists

RBL Lists (also known as IP4R Lists) are publicly accessible lists of known spammer IP addresses. These lists can be a very important part of spam protection. To attach to a list, click on Add List. Some common RBL lists are shown at the bottom of this topic.

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.

Filtering

Emails are filtered into one of four categories based on their total weight. If a weight is equal to or higher than a certain category, then it is assigned that probability of being spam. Use the Actions tab to define the weight thresholds and the default actions at each level.

Weight Threshold - The email is sorted into probability levels based on the weight threshold values.

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

SMTP Blocking

This tab allows you to set up extra spam checks that block emails at delivery if a certain amount of spam checks fail.

Enable SMTP Spam Blocking - Check this box to turn on this feature.

SMTP Block Threshold - An email must score this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab.

Options

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).

Adding and Editing RBL Lists

To add a new RBL list or edit existing ones, click on the Edit RBL Lists button.

Common Spam Lists

Name	Web Site	DNS Server	http://www.ordb.org	relays.ordb.org - -0%>
SpamCop	http://www.spamcop.net	ip.spamcop.net		
SpamHaus SBL+XBL	http://www.spamhaus.org	sbl.spamhaus.org xbl.spamhaus.org	http://relays.visi.com	relays.visi.com - -0%>

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 / Greylisting - Check the boxes for the protocols you wish to include in the blacklist or whitelist entry. The Greylisting checkbox is only available for whitelisted IPs, and if checked, the whitelisted IP will not be greylisted.

Abuse Detection

SmarterMail has several methods of preventing abuse and Denial of Service (DoS) attacks. The ones that can be configured are explained below. Any number of detection methods can be added.

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. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists or make many connections if you enable this option.

- Service Type - Select the service that will be monitored for this type of attack (POP/SMTP/IMAP/LDAP).
- 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.

Bad SMTP Sessions (Email Harvesting) - A bad session is any connection that ends without successfully sending a message. Many bad sessions usually indicate spamming or email harvesting. Leaving all of these options set to 0 (zero) will disable this type of abuse detection. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists if you enable this option.

- 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.

- 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.

Greylisting

What is Greylisting and how does it work?

Greylisting is a new tool in the fight against spam. What it does is temporarily block incoming mail from a sender. It returns the mail to the sender's mail server with a message saying try again later. The sending server must then retry sending the mail after the Block Period but before the Pass Period(see below for definitions of these values).

Greylisting is effective because spammers will not usually bother to attempt a second delivery, but legitimate e-mail servers will.

Why use Greylisting?

Greylisting is a very effective method of spam blocking that comes at a minimal price in terms of performance. Most of the actual processing that needs to be done for Greylisting takes place on the sender's server. It has been shown to block upwards of 95% of incoming spam simply because so many spammers don't use a standard mail server which will do automatic retries.

How do I set up Greylisting?

Note: You must be a system administrator to change Greylisting settings.

In order to set up Greylisting go to the the Greylisting page in the Security menu.

- Block Email with Greylisting - If this is enabled it will allow Greylisting to happen
- Allow Users to Override Greylisting - If checked, this will allow users to selectively turn off Greylisting (useful if you have an account that receives time sensitive mail)
- Block Period - The period of time(in minutes) that mail will not be accepted (default 15)
- Pass Period - The period of time(in minutes) in which the sender's mail server has to retry sending the message (default 360)
- Record Expiration - The period of time(in days) that the sender will remain immune from greylisting once it has passed (default 36)
- Apply Greylisting to SmartHosts - If this feature is enabled it will determine whether or not SmartHosts are governed by Greylisting.

Disadvantages of Greylisting

The biggest disadvantage of greylisting is the delay of legitimate e-mail from servers not yet verified. This is especially apparent when a server attempts to verify a new user's identity by sending them a confirmation e-mail.

Some e-mail servers will not attempt to re-deliver e-mail or the re-delivery window is too short. Whitelisting can help resolve this.

SpamAssassin

What is SpamAssassin and how does it work?

SpamAssassin is a powerful, free mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. These include:

- Header and text analysis
- Bayesian filtering
- DNS blocklists
- Collaborative filtering databases

When should you use SpamAssassin?

You should use SpamAssassin when you care about limiting spam from getting to your mailbox but cannot afford a high priced spam solution.

How do I set up SpamAssassin?

SmarterMail includes a Windows version of SpamAssassin out of the box. By default, SmarterMail will run a version of SpamAssassin on 127.0.0.1 port 783. The System Administrator can enable and disable SpamAssassin through the Anti-Spam Administration link in the Security menu. The Windows Version of SpamAssassin is limited to about 40,000 messages per day, if you anticipate more than this then please check out our Add SpamAssassin Servers page.

SMTP Blocked Senders

The SMTP Blocked Sender list is an effective method for temporarily canceling a domain or individual user's ability to send email on the server. For example, if a particular account is sending an abnormal amount of email, you can add their address to Blocked Senders and they will be unable to send email until you remove them from the Blocked Senders list. Users and/or domains can be left on the list for whatever time you deem appropriate, and can be an effective stop-gap versus actually deleting the user and/or domain from the server.

Blocked Senders - Enter the email addresses or domain names you want to block, one per line. The * wildcard is permitted in the list.

Forwarding BlackList

Emails cannot be forwarded to the domains in this list. This is to prevent issues with companies that have strict spam policies and blacklist the sending server for forwarded spam.

The most common instance of needing this feature is AOL *, which blacklists servers that forward spam to their servers. If this becomes a problem, you may decide to add AOL.com to your forwarding blacklist.

*AOL and AOL.com are registered trademarks of America Online, Inc.

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).

SSL

SSL/TLS support is present in SmarterMail Enterprise Edition 4.2 and higher

SmarterMail allows System Administrators to add Secure Socket Layer (SSL) and Transport Layer Security (TLS) rules. When adding a new rule there are several fields that need to be addressed. These fields are:

IP Address - This is the IP address where SmarterMail will listen.

SMTP, POP, IMAP - Determines on which port SmarterMail will listen for the respective protocol.

Type - Sets the type of rule you would like to add, SSL or TLS. SSL always assumes the connection will be secure, and therefore, sends the encryption immediately. TSL connects normally, and then looks to see if the connection is secure before sending the encryption.

Certificate Path - The path to the certificate file on the server. Typically, named a *.cer file.

- The certificate you are using must be added to the Certificates Microsoft Management Console within your Windows operating system. In addition, you must associate the Private Key with this same certificate. For more assistance with the setup of the Certificate Path and the Private Key, please refer to our Knowledge Base article .

Please Note: When removing a SSL rule, the System Administrator will need to perform a service restart.

[Additional Topics](#)

Automating Log In to SmarterMail

The HTML code below demonstrates how you can make a text link (e.g. "Log into your mail") that 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). 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.aspx>

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 create 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.aspx>

There are twenty-seven (27) 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:

- AddDomain - creates a new domain in the specified folder.
- AddDomainForwardingBlock - adds a domain forwarding block.
- DeleteDomain - deletes the specified domain.
- DeleteDomainForwardBlockByTargetAddress - deletes a domain forwarding block.
- DeleteDomainForwardingBlock - deletes a domain forwarding block.
- DisableDomain - disable the given domain.
- EnableDomain - enable the given domain.
- GetAllDomainStatistics - returns the statistics for all domains over the specified period of time.

- GetAllDomains - returns a list of all domain names.
- GetDomainDefaults - returns the default domain settings in a DomainSettingsResult object.
- GetDomainForwarding - returns the domain forwarding info in a DomainForwardInfoResult object.
- GetDomainForwardingBlock - returns the domain forwarding block settings in a DomainForwardBlockInfoResult object.
- GetDomainForwardingBlockByTargetAddress - returns the domain forwarding block settings in a DomainForwardBlockInfoResult object.
- GetDomainInfo - returns the default domain settings in a DomainSettingsResult object.
- GetDomainSettings - returns the default domain settings in a DomainSettingsResult object.
- GetDomainStatistics - returns the statistics for the specified domain over the specified period of time.
- GetPrimaryDomainAdmin - gets the primary domain admin of the specified domain.
- GetRequestedDomainDefaults - returns the default domain settings in a DomainSettingsResult object.
- GetRequestedDomainSettings - gets the settings for the specified domain.
- ReloadDomain - reloads the specified domain's settings.
- RenameDomain - renames the specified domain.
- SetDomainForwardingBlock - updates the target address and domains in a domain forwarding block.
- SetDomainForwardingBlockByTargetAddress - updates the target address and domains in a domain forwarding block.
- SetPrimaryDomainAdmin - sets the specified user to be the primary domain admin of the specified domain.
- SetRequestedDomainSettings - updates the settings for the specified domain.
- UpdateDomain - updates the settings for the specified domain.
- UpdateDomainNameAndPath - changes the specified domain's name and/or path.

Mail List Administration

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

There are sixteen (16) functions of this service available for customization. These functions allow developers and/or System Administrators to control their mailing lists using SOAP, an HTTP GET command, or an HTTP POST command. The functions, and their corresponding functions, are:

- AddDigestSubscriber - adds a digest subscriber to the specified list.
- AddList - adds a mailing list to the specified domain.
- AddSubscriber - adds a subscriber to the specified list.

- DeleteAllLists - deletes all mailing lists that belong to the specified domain.
- DeleteList - deletes a mailing list that belongs to the specified domain.
- GetDigestSubscriberList - returns the digest subscribers for the given list.
- GetListCommandAddress - gets the command list address for the specified domain.
- GetMailingListsByDomain - deletes all mailing lists that belong to the specified domain.
- GetRequestedListSettings - gets the requested settings for the specified list.
- GetSubscriberList - returns the subscribers for the given list.
- RemoveDigestSubscriber - removes a digest subscriber to the specified list.
- RemoveSubscriber - removes a subscriber to the specified list.
- SetDigestSubscriberList - sets the digest subscribers for the given list.
- SetListCommandAddress - sets the command list address for the specified domain.
- SetRequestedListSettings - sets the requested settings for the specified list.
- SetSubscriberList - sets the subscribers for the given list.

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 twenty-one (21) 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.
- AddUser2 - creates a new user and adds them to the specified domain.
- AddUserGroup - creates a new user group adds it to the specified domain.
- AuthenticateUser - returns a true ResultCode if the user name, domain name, and password match.
- DeleteUser - deletes the specified user from the specified domain.
- GetRequestedUserSettings - gets the specified user's settings.
- GetUser - returns attributes of the specified user.
- GetUserAutoResponseInfo - returns the forwarding info of the specified user.
- GetUserForwardingInfo - returns the forwarding info of the specified user.
- GetUserGroup - gets a user group in the specified domain with the given id.
- GetUserGroupsByDomain - get all user groups in the specified domain.
- GetUserGroupsByUser - get all user groups in the specified domain containing the give user.
- GetUserStats - returns statistics of the specified user for the specified time period.
- GetUsers - Returns attributes of each user in the specified domain.

- LoginValidated - returns a LoginResult object with the LoginValidated field set to True if the specified username matches the specified password.
- RemoveUserGroup - deletes a user group from the specified domain with the given id.
- SetRequestedUserSettings - updates the specified user's settings.
- UpdateUser - updates the specified user's settings.
- UpdateUser2 - updates the specified user's settings.
- UpdateUserAutoResponseInfo - updates the specified user's auto response settings.
- UpdateUserForwardingInfo - updates the specified user's forwarding settings.

Server Administration

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

There is one (1) function of this service available for customization. This service allows developers and/or Administrators to monitor the server spool using SOAP, an HTTP GET command, or an HTTP POST command. The function, and their corresponding properties, is:

- GetSpoolMessageCount - returns the number of messages in the spool.

Synchronization

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

There are thirty-four (34) functions of this service available for customization. This service allows developers and/or Administrators to monitor the server spool using SOAP, an HTTP GET command, or an HTTP POST command. The function, and their corresponding properties, is:

- AddCalendar - Deprecated. Please use AddCalendarEx.
- AddCalendarEx - Adds a calendar item to a folder.
- AddContact - Deprecated. Please use AddContactEx.
- AddContactEx - Adds a contact item to a folder.
- AddNoteEx - Adds a note item to a folder.
- AddTask - Deprecated. Please use AddTaskEx.
- AddTaskEx - Adds a task item to a folder.
- DeleteCalendar - Deprecated. Please use DeleteCalendarEx.
- DeleteCalendarEx - Deletes a calendar from a folder.
- DeleteContact - Deprecated. Please use DeleteContactEx.
- DeleteContactEx - Deletes a contact from a folder.
- DeleteNoteEx - Deletes a note from a folder.
- DeleteTask - Deprecated. Please use DeleteTaskEx.
- DeleteTaskEx - Deletes a task from a folder.

- FreeBusy - Returns times when a users calendar is busy.
- GetCalendar - Deprecated. Please use GetCalendarEx.
- GetCalendarEx - Returns a calendar based on guid.
- GetContact - Deprecated. Please use GetContactEx.
- GetContactEx - Returns a contact based on guid.
- GetItemCount - Returns a count of each type of item.
- GetNoteEx - Returns a note based on guid.
- GetTask - Deprecated. Please use GetTaskEx.
- GetTaskEx - Returns a task based on guid.
- GetUserFolders - Returns the folders to which the user has access.
- IsLicensed - Returns true or false depending on if the domain has a license key for the Sync Tool.
- Login - Returns true or false depending on if the login and password is correct.
- RequestCalendarList - Deprecated. Please use RequestCalendarListEx.
- RequestCalendarListEx - Returns a list of guids and their hashes corresponding to all calendar events.
- RequestContactList - Deprecated. Please use RequestContactListEx.
- RequestContactListEx - Returns a list of guids and their hashes corresponding to all contacts.
- RequestNoteListEx - Returns a list of guids and their hashes corresponding to all notes.
- RequestTaskList - Deprecated. Please use RequestTaskListEx.
- RequestTaskListEx - Returns a list of guids and their hashes corresponding to all tasks.
- VersionNumber - Returns the version of SmarterMail.

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.

SmartGateway server

- Use as a delivery mechanism to balance the load on your gateway servers.
- To configure:
 - Add a placeholder domain (called "example.com") to open up the port to listen on.
 - Set relay option in General Settings to "nobody".
 - Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
 - In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

Backup MX Servers

A Backup MX Server is a mail server that will store (spool) your incoming email if your primary mail server becomes unavailable. A mail server can become unavailable to receive incoming mail for a number of reasons. A few examples are:

- Hardware or software failure
- Very busy and unable to receive new incoming connections, or emails
- Network connection is down or saturated
- Network routing issues can also cause your mail server to become unavailable

Case 1 - No Backup MX

If you do not have a Backup MX Server, the following conditions may occur:

- Email will be bounced (Returned to Sender)
- Your (inbound) email will cause a backup in the originating mail server's spool
- Service Timeout; Depending on the Retry attempts by the originating mail server, your mailboxes may never receive their incoming email
- Users do not understand bounce messages; To most users, bounce messages are unreadable, so when they can't send an email, they do not try to resend.

Case 2 - With a Backup MX

How Email works when a Backup MX Server is involved:

- User sends an email to 'user@example.com' (a mailbox hosted by your SmarterMail Server)
- Their mail server looks up the MX Records for 'example.com' and finds two:
 - IP: x.x.x.x Weight: 10
 - IP: y.y.y.y Weight: 20
- Their mail server first attempts to connect to: x.x.x.x

- Connection fails, which could be caused by any of the above conditions)
 - They try to connect to the secondary MX record: y.y.y.y
 - They successfully connect to this server.
 - Email transmission begins, and the Backup MX Server receives the email into its spool.
 - Since there are no existing local domains on this server, SmarterMail stores this email in its spool.
 - Based off of the Retry Attempts, SmarterMail will continue to try and make connections to your Primary Mail Server.
-
- SmarterMail will only make 4 retry attempts. It is recommended that you set the last attempt to a longer timeframe, i.e., 24 hours (1440 minutes)
 - This way SmarterMail does not send a Bounce Message to the originator saying that it could not deliver the message, before your Primary Server is back online.
 - If your Primary Mail Server comes back online before the final Retry Attempt, you can reset the Retry Counts on all messages in the spool. This will force the Backup MX Server to try forwarding all existing mail in the spool back to your Primary Mail Server.

Configuring a Backup MX Server

- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

Locking Down Your Server

Security is an ever-growing concern to business small and large. Because email servers are constantly under attack, SmarterMail has many features built into it to protect you. This topic explains steps you can take to protect yourself, your users, and your investment.

What is Security for a Mail Server?

The word security has many meanings. SmarterTools feels that mail server security is comprised of several types of protection:

- Protecting your data
- Protecting your users
- Protecting your service availability
- Protecting others on the internet

Below are some "Best Practices" for maintaining a locked-down server, one that can withstand the constant abuse that mail servers are subject to.

- Update SmarterMail regularly
- Disable catch-all accounts
- Restrict bounces and auto-responders
- Require SMTP authentication
- Encourage the adoption of SPF

Update SmarterMail Regularly

SmarterTools is constantly working to improve SmarterMail and make it even more resistant to attacks. It is recommended that you keep your copy of SmarterMail up to date in order to stay protected.

To receive notifications of every update that SmarterTools releases for SmarterMail, go to the SmarterTools mailing lists page at <http://www.smartertools.com/Pages/MailingLists.aspx> and subscribe to the "Updates.SmarterMail" mailing list. Whenever a new update for SmarterMail is released, an email is sent to that mailing list. The list is not used for any other purpose.

Disable Catch-All Accounts

Catch-all accounts were popular in the past because of the flexibility they offer to a domain administrator. All an administrator had to do was add a catch-all account, and any mail that was mis-delivered would drop right into his mailbox. At the time when catch-alls were most popular, spamming methods were not as sophisticated, and email harvesting attacks were not so prevalent.

Today, however, mail servers get attacked every minute of every day. Spammers assault email domains with thousands of spam messages sent to different email accounts in the hope that they will strike a hit and (a) verify that the email account exists and (b) deliver another spam email.

In addition, if the catch-all user has an auto-responder enabled, the problem can be doubly harmful. Spammers rarely use their real email address, so if your user auto-responds to each of the thousands of messages above, and they happen to go to a large email provider, you will likely end up getting blacklisted as a spammer yourself.

As you can see, allowing the use of catch-all accounts exposes you to many types of abuse. SmarterMail allows catch-alls because it is expected in a mail server, but to lock down your server, we recommend the following procedure that will disable catch-alls:

- Alert your users that catch-alls are being disabled.
- Go to the General Settings page under the Settings menu.

- Click on the Security tab.
- Change Catch-Alls to Disabled.
- Click on Save.

Restrict Bounces and Auto-Responders

Email Bouncing occurs when delivery failures occur or a mailbox is full. A brief explanation of the error is sent back to the original sender of the message. Before spam became such a problem, this was usually not an issue. Today, however, spammers will sometimes spoof known spam trap accounts at places like SpamCop as the sender of the message. Thus, when your mail server bounces the message, the bounce ends up in the spam trap. Enough of these, and you'll be blacklisted.

The exact same is true for auto-responders that reply back to spoofed spam email.

SmarterMail allows you to restrict bounces and auto-responders to only those accounts that pass SPF checks, or to disable them entirely. SPF verifies that an email is not spoofed, and most of the serious spam trap accounts out there have SPF set up. To require SPF for bounces and auto-responders, do the following:

- Alert your users of the new policies being put into place.
- Go to the General Settings page under the Settings menu.
- Click on the Security tab.
- Change Auto-Responders to either Disabled or Require SPF.
- Change Bouncing to either Disabled or Require SPF.
- Click on Save.

Require SMTP Authentication

SMTP Authentication is an unspoken requirement of domains on modern mail servers. Any domain that does not have Authentication enabled is at a serious risk of being a relay for spam. Spammers will try thousands of email accounts until they find one to send through, and if Authentication is not enabled, they will be able to use up your bandwidth and system resources to send mail.

Enabling SMTP Authentication ensures that users must supply credentials to send email from your server. This requires a change in their email clients so that the account information gets passed in SMTP, so there is often a bit of a learning curve. This process is necessary and important to protect your server, however, and without you are open for abuse.

To require SMTP Authentication for a domain, do the following:

- Alert your users of the change they will need to make to their email client. Due to the nature of this change, it is wise to give them a fair amount of warning.

- Go to Manage Domains.
- Click on the Actions menu next to the domain and choose Edit Domain.
- Go to the Technical tab.
- Check the Require SMTP Authentication box.
- Click on Save

It is also recommended that you update this setting in Default Domain Settings so that all new domains will require SMTP Authentication.

To apply this setting to all domains on your server at once, use the Default Domain Settings Propagation page in the Settings menu.

Encourage the Adoption of SPF

SPF is an excellent method of preventing email spoofing, protecting your users from having their domain show up on spam throughout the world. SPF, however, is only as effective as you make it, as it requires changes to your DNS servers for each domain you host email for.

It is in the best interest of all email users everywhere that domain administrators add SPF records to their domain that indicate what servers are authorized to send email for their domain. Encouraging your domain administrators to adopt SPF protects them from being the victims of spoofing, and reduces the spam threat on not only your server, but others throughout the world as well.

More information can be found at <http://www.openspf.org/> .

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 (MX) - Add an MX record for the domain that points to mail.example.com. 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.

Changing the System Administrator Login

By default, the login for the system administrator for SmarterMail is admin / admin. While this is easy to remember, it is also fairly easy to guess. For this reason, SmarterTools recommends that you change the administrator login as the very first step when configuring SmarterMail.

Instructions

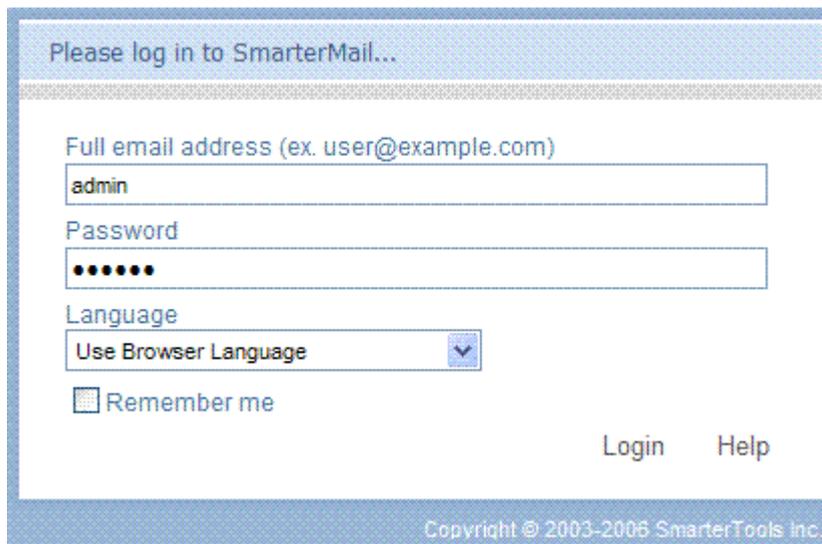
- Log in as the administrator with the current login
- Go to the Settings -> General Settings page
- Click on the Administrator tab
- Enter the current password for verification
- Enter a new username and password (avoid using an email address for the username)
- Click on Save

Resetting an Unknown Login

For instructions on how to reset an administrator login when the current login is unknown, please see the KB article at <http://support.smartertools.com/Customer/KBArticle.aspx?articleid=5> .

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.

The image shows a web browser window with a blue border. At the top, a blue header bar contains the text "Please log in to SmarterMail...". Below this, the login form is displayed on a white background. It includes a label "Full email address (ex. user@example.com)" above a text input field containing "admin". Below that is a "Password" label above a text input field filled with seven black dots. A "Language" label is above a dropdown menu currently set to "Use Browser Language". At the bottom left of the form is a checkbox labeled "Remember me". At the bottom right are two buttons: "Login" and "Help". A footer at the very bottom of the window reads "Copyright © 2003-2006 SmarterTools Inc."

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.

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 is created after installation on any one server in your network, and 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 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 v2.0 to fix it:

- Manually re-map .NET version 2.0 (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 v2.0, 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.

SmarterMail Sync Help

General Information

How SmarterMail Sync Works

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

SmarterMail Sync is an on-demand synchronization tool. After installing it, a toolbar will be added to your copy of Microsoft Outlook that will allow you to easily synchronize with SmarterMail whenever you need.

SmarterMail Sync uses port 80 (HTTP) to connect to your SmarterMail server on the internet, then uses internal methods to synchronize the information with Outlook. In most cases, this process is completely automatic. ' If a conflict occurs (for example, if an item was edited on the web and in Outlook since the last sync), you will be asked how to handle the conflict.

SmarterMail Sync Requirements

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

The requirements of SmarterMail Sync are minimal, so that it can coexist with other applications on the same computer. Please note there are now two versions of SmarterMail Sync for Microsoft Outlook. One version is for Outlook 2000 only, and the other is for Outlook 2007, XP, and 2003 users.

- Windows 2000, Windows XP, Windows 2003, or Windows Vista (all versions)
- Microsoft Outlook 2007, XP, 2003 and 2000
- Microsoft .Net Framework 2.0 (available from Windows Update)
- RAM: 256mb
- CPU: PIII 500
- DISK: 30 Megs

In general, the Outlook connector of SmarterMail Sync will add about 10 MB of memory usage to what Outlook uses on your computer without SmarterMail Sync.

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Product and Component Acknowledgements

No external components were used in the SmarterMail Sync product.

Outlook Integration

Configuring Accounts for Synchronization

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

Before you can synchronize any SmarterMail accounts with Outlook using SmarterMail Sync, you must first set them up in the sync tool. This will provide the tool with the information it needs to connect to your SmarterMail account(s) online.

To manage your accounts, after installing the sync tool, click on the SmarterMail Sync toolbar item, and choose Account Settings from the menu.

Accounts need the following information:

- Name - Enter a friendly name to identify this account.
- SmarterMail URL - Type the full URL of your SmarterMail webmail interface into this dialog. For example, <http://mail.example.com>
- Email Address - Enter your full email address.
- Password - Type the password for your SmarterMail account.
- Synchronization - Check the boxes for the items you wish to synchronize. If you wish to sync to a non-default calendar, task list, or contact list, click on the "..." button next to it.

You can use the Test button to ensure that the connection works, and use the Next button to store the information.

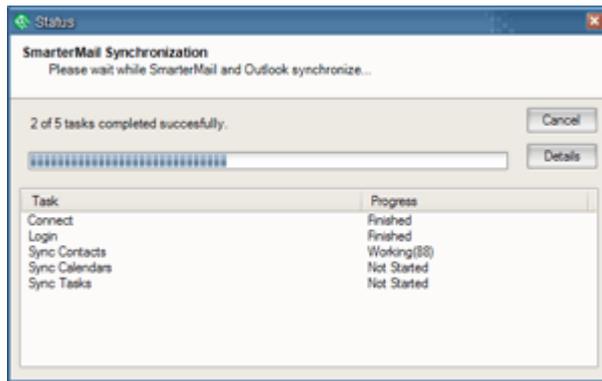
Terms Used

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.

Synchronizing Accounts

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher



To begin synchronizing an account, click on the Synchronize button in the toolbar and choose the account name you want to synchronize. The accounts that show up in the drop down list are the same ones you add through the Account Settings dialog.

The synchronization process will begin, and a dialog will appear showing you the progress of the operation. Once the process is completed, the dialog will disappear, similar to how Outlook operates during Send/Receive.

If a conflict occurs, a dialog will appear allowing you to resolve it. For more information, see the help topic Resolving Conflicts .

Resolving Conflicts

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher	
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In the course of synchronizing accounts, conflicts may occur. For example, if you update a contact in Outlook and in SmarterMail, the changes may conflict with one another. In that case, a dialog will appear asking you to resolve the conflict.

In the conflict dialog, choose whether you wish to keep the SmarterMail item, or the Outlook item by checking the corresponding radio button. In some cases, a dropdown may appear next to the Outlook item if there are multiple matches in Outlook.

Data in this dialog is color coded to help you identify information more easily. Definitions of what the color coding means appears in the table below:

Black	No conflict
Green	Information that is contained in one record, but not the other
Red	Information that is different between the two records

If you wish to ignore the conflict, click on the Skip button. However, if you choose to ignore a conflict, you will be prompted about the contact later.

If this is a new contact, and doesn't match one of your existing contacts in Outlook, click on the New button.

Troubleshooting

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

The items below will help you resolve the most common causes of trouble with the SmarterMail Sync application.

SmarterMail Sync not licensed

A license must be purchased and activated on each email domain to which you wish to sync. Contact your domain administrator for assistance with this. SmarterMail 3.1 or higher is required to be installed on your email domain to use the sync tool.

If you are the domain administrator, you can find information on licensing SmarterMail Sync within the SmarterMail Web Interface in the Domain Settings menu.

SmarterMail Sync license has expired

SmarterMail Sync is licensed per email domain on an annual basis. This allows you free upgrades as long as your license remains active. If you see a notice that your license has expired, contact your domain administrator and have them log into the SmarterMail interface to renew the domain license.

Connection problems when synchronizing

Follow through some of the steps below to help resolve connection issues:

- Check to see if you have an active internet connection by going to a well-known web site, like google.com or amazon.com. If these fail, contact your ISP.
- Check to see if you can log into your SmarterMail account through a web browser. If not, contact your domain administrator.
- In SmarterMail, click on Help -> About SmarterMail to verify that the version number is at least 3.1.xxxx
- Ensure that the URL you entered to get to your webmail is the same as that used for the account you set up in SmarterMail Sync.

SmarterMail Sync Help

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

Welcome to the SmarterMail Sync Help System. On the left you can find various topics that will help you use and understand the product. Above, you can find links that will allow you to search this Help System, or you may alternatively visit our Community Forums, as they are excellent sources of information from other SmarterMail users.

Common Help Topics

- Configuring accounts to be synchronized
- Synchronizing accounts
- Resolving Conflicts

What is SmarterMail Sync?

SmarterMail Sync is a desktop utility that allows you to quickly and easily synchronize information from Outlook with an active SmarterMail account on the internet. Using this utility, you can synchronize:

- Contacts
- Appointments
- Tasks
- Notes (Outlook only)

Currently, SmarterMail Sync runs on Outlook 2003, Outlook XP, and Outlook 2007. Your email server must be running SmarterMail 3.1 or higher to use this utility.

Getting Started

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher	
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This help topic concentrates on how to get SmarterMail Sync up and running, and explains the best practice for installing the product for the first time.

- Install the product
- Add an account to synchronize
- Synchronize the accounts

Install the product

Run the installation file to install SmarterMail Sync on your desktop. SmarterMail Sync will automatically integrate itself into Microsoft Outlook. The latest versions of SmarterMail Sync is available from www.smartertools.com

	Download and install SmarterMail Sync.
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Add an account to synchronize

From within Microsoft Outlook, click on the SmarterMail Sync toolbar item and choose Account Setup. Add all necessary information about the account you want to synchronize with. ([more info](#))

	Add an account to SmarterMail Sync.
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Synchronize the accounts

After setting up the account(s), click on the synchronize toolbar item and choose the account you wish to synchronize with. If conflicts arise, please refer to the online help to learn how to resolve them. ([more info](#))

	Synchronize the account(s).
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SmarterMail Sync Frequently Asked Questions

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher
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SmarterMail Sync keeps telling me that it is unlicensed, or that the license has expired. What do I do? Contact your domain administrator to have them purchase and install a license for SmarterMail Sync on your email domain. Since the licensing is an annual charge, your administrator will have to renew the license every year.

How do I resolve connection issues or synchronization problems? Please refer to the Troubleshooting help topic in the online help.

Release Notes

SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher
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Version 1.1.2711 (6/4/07)

- CHANGED: Separate version for Microsoft Outlook 2000 only.
- CHANGED: Upgraded version for Microsoft Outlook 2007, XP, and 2003 users. This version runs on the .Net 2.0 framework for improved performance.

- ADDED: SmarterMail Sync for Pocket PC 2005.
- ADDED: SmarterMail Sync for SmartPhones running Windows Mobile 5.

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Your sole remedy under this Agreement shall be limited to replacement of the Software.

4. Technical Support.

Currently, SmarterTools provides technical support for the Software via SmarterTools personnel, documentation, and Internet resources. Depending on Your Features Selection, including but not limited to pricing, volume, Software version, and the number of licenses You purchased, a certain amount of technical support may be included at no additional charge. Otherwise, technical support may be available for an additional charge on a per incident, per call, per time-frame basis, or in other support packages. The amount of these charges may vary from time to time. Technical support is provided AS-IS, and the provisions of Sections 3 and 5 apply to technical support.

SmarterTools provides no guarantee, expressed or implied, regarding the efficacy or continuation of technical or other support for this Software or particular version of this Software for any length of time and SmarterTools may choose to discontinue such support at any time and for any reason, with or without notice.

5. Indemnification.

You shall defend, indemnify, and hold harmless SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns (hereafter "SmarterTools Indemnified Parties") from any claims, damages, losses, or expenses (including without limitation attorney fees and costs) incurred in connection with any and all damages, losses, claims, suits, judgments, or causes of action

asserted against SmarterTools Indemnified Parties by You, Your Customers, or any third parties related to:

- * Any claims arising from or related to Your use of the Software or use of the Software by Your Customers or any portion thereof, including but not limited to claims of infringement of patents, copyrights, or other intellectual property or proprietary rights arising from your use of the Software or from use of the Software or any portion thereof in combination with any other software, hardware, device, system, or service;
- * Damages arising from Your breach or Your Customer's breach of this EULA;
- * Any loss, misdirection, or inaccuracy of any and all data, message, and/or information (partial or complete) by or directed to You, Your Affiliates, Your Customers, Your vendors, Your assignees, or any related third party and from any action, inaction, or consequence arising out of such loss, misdirection, or inaccuracy of any data, message, or information;
- * Any misuse, abuse, hostile transmission, fraud, or unlawful action arising from or related to the use of the Software or any portion thereof by or directed at You, Your affiliates, Your Customers, Your vendors, Your assignees, and/or any related third party;
- * Any claim, damage, loss, or expense related to the installation, quality, use, operation, functionality, transfer, or deinstallation of the Software to You, Your Customer(s), or third parties.
- * Any charges imposed by You or third parties on You or Your Customers related to Your or Your Customer(s)'s use of the Software, including but not limited to charges for data transmission and bandwidth, regardless of whether you have followed any configuration recommendations provided with the Software or Software documentation.

6. Transfers.

The rights under the License may be sublicensed under the terms of Section 1.C. or transferred to any of Your successors, heirs, or assigns upon prior written notice to SmarterTools. Any other attempt to sublicense, assign, or transfer any of the rights, duties, or obligations hereunder is void unless You have a separate written agreement with SmarterTools allowing for such transfer(s).

7. Jurisdiction.

This Agreement shall be governed in all respects by the laws of the United States and the State of Arizona, except for conflict of law provisions. The parties agree that for any dispute, controversy or claim arising out of or in connection with this Agreement, venue and personal jurisdiction shall be in the federal, state, or local court with competent jurisdiction located in Maricopa County, Arizona. The prevailing party will be entitled to an award of reasonable attorney's fees.

In the case that You are an agency or entity of the United States Government, the following additional terms apply:

* The Software qualifies as Restricted Computer Software, as defined in the Rights in Data-General clause at Federal Acquisition Regulations 52.227-14.

* Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013.

8. Payments.

You shall pay the total fee(s) for the Software imposed by SmarterTools at the time of License purchase, unless separate payment terms have been specifically arranged with SmarterTools in advance. You shall pay all invoices rendered by SmarterTools within thirty (30) calendar days after from invoice date, or within another time frame set forth by SmarterTools in writing in a separate agreement. All payments shall be made in United States Dollars (\$). If You fail to pay any amount due within the related timeframe described herein, SmarterTools may impose late charges equal to the lesser of 1.5% per month or the highest interest rate allowable by applicable law, together with all related expenses and collection costs, including reasonable attorneys' fees, incurred by SmarterTools collecting any amounts owed under this EULA. Further, You shall reimburse SmarterTools for any out-of-pocket expenses incurred in connection with duties performed by SmarterTools hereunder. Upon request by You, SmarterTools shall provide You with reasonable documentation evidencing the out-of-pocket expenses incurred by SmarterTools.

SmarterTools may disable the related License Key and/or access to the Software Feature Selections for the Software if related invoices are not paid within a reasonable timeframe as determined by SmarterTools in its sole discretion. Licenses purchases that are made fraudulently, deceptively, or that result in a charge-back or disputed charge are considered to be not paid and are subject to immediate disablement.

9. Limitations to Customization.

Should You choose to alter the appearance and/or user interface of the Software (the "Skin") by using the custom style or Skin options that may or may not be included in certain versions of the Software or by using a third-party process to alter the appearance or interface of the Software, the following requirements must be met:

* You shall maintain and not remove or obscure any proprietary notices in the Software. The SmarterTools name may be displayed in any font type or style, but it must be displayed in no smaller than 8-point font. The name of the Software shall remain visible to the naked eye and free from any

clutter or similar color scheme (e.g. black font on a black or similarly dark background that would preclude the user from easily identifying the Software). Use of the qualifiers "powered by" and "provided by" is permitted (e.g. "Powered by SmarterMail"). Any deviation from these limitations must be approved in writing by SmarterTools in advance of implementation and may result in additional license fees, if applicable.

* All applicable copyright and trademark information shall remain visible to the naked eye, free from any clutter or similar color scheme, and can be displayed in any font type or style but shall be displayed in no smaller than 8-point font.

10. Transmission of Information and Communication.

Upon the Effective Date and at other times during the term of this EULA You may be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g. credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

From time to time SmarterTools may contact You at any address, including any email address(es), You have provided to SmarterTools regarding the Software, available Updates or Features Selection for the Software, or for promotional purposes. You hereby expressly consent to such communications. If you do not wish to receive further notices, you may notify SmarterTools of your preferences.

From time to time the Software may cause computers, servers, and/or other electronic devices on which You install and operate this Software to use the internet or other means to exchange data with computers, servers, or other electronic devices owned by SmarterTools in order to maintain licenses, communicate updates or instructions, track the location and install base of the Software, gauge performance, enforce SmarterTools' rights with regard to licensing and this EULA, or other information as is needed to properly maintain, protect, or update the Software and Licenses. Acceptance of this Agreement indicates Your acceptance of this communication and Your assumption of the incumbent risks associated with such communication.

11. Severability.

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein. 12. Entire Agreement. This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and understanding relative thereto, if any, being herein merged. This Agreement replaces and supersedes any prior agreement entered into between the parties hereto with respect to the subject matter herein and may only be modified, altered, or amended by an instrument in writing signed by SmarterTools.

Thank You for choosing SmarterTools Software.

Rev. 20081015

Glossary

Below is an alphabetized list of the various terms and phrases used in the SmarterMail Product.