SmarterMail 5.x

Help Documentation

SmarterMail Help

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

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

Common Help Topics for Users

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

Common Help Topics for Domain Administrators

- • Adding email accounts
- • Adding email aliases
- • 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
- • Activate SmarterMail
- • 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 Edition 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 Edition. Once the install begins, a wizard will walk users through a 4-step process to get started.

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.

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, click the Settings button in the main toolbar, and select Activate Product from the Activation folder in the left tree view. Please refer to the help topic Activating SmarterMail for more information on this process.

	Activate SmarterMail, if necessary.

Add an Email Domain to SmarterMail

Detailed instructions for adding a domain can be found in the topic Adding a Domain .

	From the Manage section, choose New Domain.

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

Configure DNS for the Domain

There are three major things to set up on your DNS server for each site you add to SmarterMail: An A Record, an MX Record, and a Reverse DNS Record. How you set these up is dependent 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. Example.com will be used where your domain name should go.

	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).

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	8.0	• This application is currently in BETA, but there are no known issues at this time.
Internet Explorer	6.0 and above	• No known issues
Internet Explorer	5.5 and earlier	• Highly recommend you upgrade your browser at http://www.microsoft.com
Google Chrome	Currently in BETA	• The editor tool bar does not format properly when composing or responding to an email message
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues
Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Mozilla	1.7	• Slight display issues
Safari	3.0	• No known issues

Opera	9.2	• Limited AJAX functionality
Opera	8.5	• Slight display issues
Opera	7.0 and earlier	• Recommend you upgrade your browser to Opera 9.2 at http://www.opera.com

Linux Browsers	Version	Known Issues
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues
Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Mozilla	1.7	• Slight display issues

Macintosh Browsers	Version	Known Issues
Safari	3.0	• No known issues
Safari	2.0	• No known issues
Safari	1.3	• Slight display issues
Firefox	1.5 and above	• No known issues
Firefox	1.0	• Slight graphical issues
Firefox	Earlier than 1.0	• Recommend upgrading to Firefox 1.5 or higher at http://www.mozilla.com/
Opera	9.2	• Limited AJAX functionality
Opera	8.5	• Recommend you upgrade your browser to Opera 9.2 at http://www.opera.com

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Product and Component Acknowledgements

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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

Deployment Guides

SmarterTools deployment recommendations fall into three categories: Individual and micro-business architectures, Small to medium-sized business architectures, and High-volume architectures.

For the purposes of these recommendations:

> • Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 In / 12,500 Out). This infers a maximum of 100 employees/users. Information regarding these architectures is available in the SmarterMail in Individual and Micro-Business Deployments document.
> • Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 In / 200,000 Out). This infers a maximum of 1600 employees/users. Information regarding these architectures can be found in the SmarterMail in Small to Medium-sized Business Deployments document.
> • High-volume deployments shall include ISPs, Hosting Companies, Large Businesses, and Enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of employees/users. Information regarding these architectures can be found in the SmarterMail in High Volume Deployments document.

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> • Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 In / 200,000 Out). This infers a maximum of 1600 employees/users. Information regarding these architectures can be found in the SmarterMail in Small to Medium-sized Business Deployments document.

• High-volume deployments shall include ISPs, Hosting Companies, Large Businesses, and Enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of employees/users. Information regarding these architectures can be found in the SmarterMail in High Volume Deployments document.

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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, Windows 2008, 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 third-party web server. IIS, on the other hand, is an enterprise level web server and when paired with SmarterMail, will provide the highest performance. For more information in using IIS to host the web interface, please see Converting to IIS .

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
500	3,000	250,000	• Windows 2000 or higher • CPU: Dual P3 • RAM: 512 MB
5,000	30,000	1,000,000	• Windows 2003 • CPU: Dual Xeon • RAM: 2.0 GB
Gateway	N/A	2,000,000	• 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. To configure IIS7 in Windows 2008, please see the end of this page.

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

	Click on the Stop button

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

	Click on the Close button

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

	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 mail processing directory. Choose Properties from the pull-down menu.

	In the Execute Permissions dropdown box, choose "Scripts Only" 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.

Configuring IIS7 for Windows 2008.

Disable the SmarterMail Web Server

	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 an Application Pool

	Click Start -> Control Panel -> Administrative Tools -> Internet Information service (IIS) Manager

	Right click Application Pools and select "Add Application Pool"

	Name the pool "SmarterMail" (or something similar)

	Set Managed Pipeline Mode to "Classic" and click OK

Add SmarterMail to IIS

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

	Select ServerName -> Open ISAPI and CGI Restriction -> Verify that ASP.NET v2.0 is allowed (If not, right click on ASP.NET v2.0 and select "Allowed")

	On the left side of the page, right click and choose "Add Website"

	Name the Site "SmarterMail"

	If you created an Application Pool name other than "SmarterMail" click Select and choose the correct Application Pool

	For the physical path, browse to the SmarterMail/MRS folder. The default location is C:\Program Files\SmarterTools\SmarterMail\MRS

	For Binding, choose an 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.

	Click OK

Verify IIS Settings

	In IIS Manager click ServerName. Under Security double click ISAPI and CGI Restrctions. Then, verify that ASP.NET v2.0 is allowed. If it is not right click on ASP.NET v2.0 and select "Allowed."

	In IIS Manager double click Sites -> Double click the SmarterTools site -> Double click on the App_Theme folder. Under HTTP features double click HTTP Response Headers. Under the Action menus, click Set Common Headers -> Check Expire Web content -> Click After -> Click the add 7 for the number of days -> Click OK

	In Administrative Tools under Services, Verify that World Wide Web Publishing Service is Running

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. To configure IIS7 for Windows 2008, please see the end of this page .

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 mail processing directory. Choose Properties from the pull-down menu.

	In the Execute Permissions dropdown box, choose "None"

	Click on OK to save the settings

Verify IIS Settings

	If you are using Windows 2003, verify that the ASP.NET 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.

Test the Site

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

Configure Virtual Directory in IIS7 in Windows 2008

Disable the SmarterMail Web Server

	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 an Application Pool

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

	Right click on Application Pools and choose "Add Application Pool"

	Name the pool SmarterMail (or something equivalent)

	Set Managed Pipeline Mode to "Classic" and click OK

Add SmarterMail to IIS Virtual Directory

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

	Select ServerName -> Open ISAPI and CGI Restrictions and verify that ASP.NET v2.0 is allowed. (If it is not, right click on ASP.NET v2.0 and select Allowed.)

	Right click on a Web site and choose Add Virtual Directory

	When asked for an Alias, enter "SmarterMail" or something simmilar. (This will be used in the URL to get to WebMail, as in www.example.com/smartermail)

	For the physical path, browse to the SmarterMail\MRS folder. Default location: C:\Program Files\SmarterTools\SmarterMail\MRS

	Click OK

	Right click on the Alias "SmarterMail" (or whatever name you gave to your Application Pool) and select Convert to Application

	Click on Select to change the Application Pool to the SmarterMail Pool

	Click OK, and then OK

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 activate the product, click the Settings button from the main toolbar, then select Activate Product from the Activation folder in the left tree view.

If you have any difficulties activating SmarterMail, please contact SmarterTools support. Information can be found on the SmarterTools Support page.

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.

Return to Getting Started

Performing a Full Uninstall

Note: Following these steps is not necessary to upgrade an existing installation.

The steps below can be taken to completely delete all SmarterMail related files and data from a system.

- Uninstall Mail through Control Panel->Add Remove Programs
- Delete C:\SmarterMail (default location, may differ if changed by user)
- Delete C:\Program Files\SmarterTools\SmarterMail (default location, may differ if changed by user)

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

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

	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 5.x release, perform the instructions below.

Please note that if you are upgrading from a version previous to 5.0, and you are not running under the Free Edition, you will need to upgrade your license key first.

From a previous 5.x release

For example, if you are upgrading from SmarterMail 5.0 to SmarterMail 5.1.

- 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
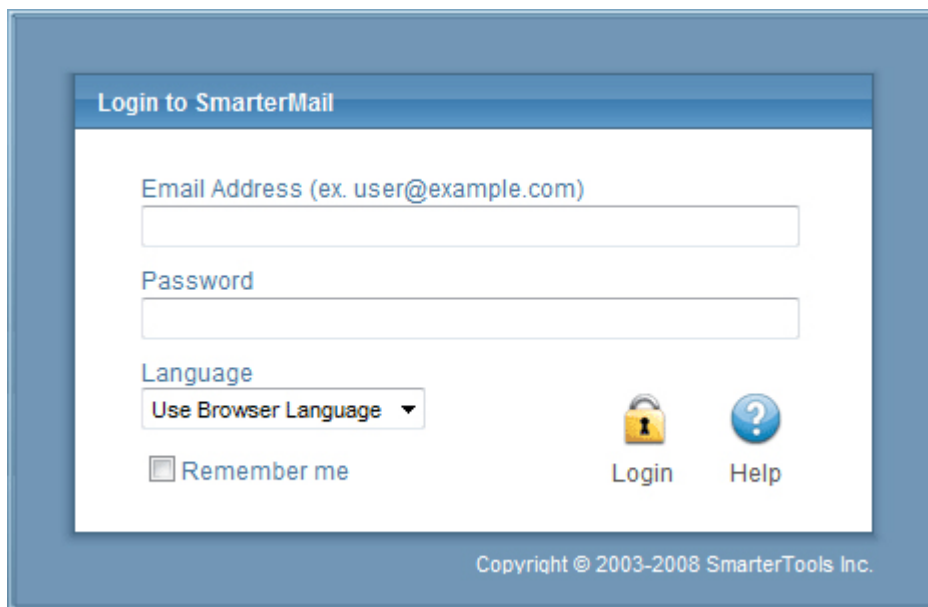
From a release before 5.0

For example, if you are upgrading from SmarterMail 4.x to SmarterMail 5.x.

- Backup your SmarterMail installation and data
- Ensure you have a valid license key for SmarterMail 5.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.
- 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

How to Login to SmarterMail

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

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 clicking on the Settings button on the main toolbar, then selecting Account Settings in the My Settings tree view, and finally choosing the Webmail tab and changing the "Initial Page on Login" setting.

Email

Email Overview

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

- Create a New Message
- Reading a Message
- Searching Messages
- Deleting Messages
- Manage Folders
- Related Topics

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.

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.

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, such as Mark, Move, or Delete. Clicking on the check box in the header will select all / none of the items.
- 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.
- Attachment Icon - If the message(s) has an attachment, a paper clip icon will show up next to the size.

Navigating Pages

Use the navigation area below the list of messages to browse through multiple pages of email. The page number in the shadow box is the current page you are viewing. To view a different page, simply click on the page number you wish to view.

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. Clicking the indicator will take you directly to the Disk Usage Summary Report.

Actions

There are four Icons across the top of the Inbox toolbar☐Mark, Move, Delete, and Search. 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. You must first select a message(s) by clicking on an individual message, or clicking multiple messages using the check boxes next to the envelope in the message display pane.

Mark - This icon is shown with a red flag and will enable you to perform 3 actions—Read, Unread, and Spam. You can perform this action two different ways.

> • 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.
> • Mark as Not Spam - This will mark all checked emails as not being spam. It will automatically put that particular email address on the trusted senders list.

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

Move - This is signified with a folder and a blue arrow and will enable you to move messages between all your folders. This action can be performed three different ways after you select the message(s) you would like to move.

> • Move your mouse over the Move icon from the actions toolbar. When you do that, all the available folders with appear in a drop down list. Choose the desired folder which you would like the message(s) sent to; or
> • Move your mouse over the selected message(s) and right-click. After you right-click, a drop down list will appear with 3 items, move your mouse over Move . When you do that, all your available folders will be shown in another drop down list, choose the desired folder; or

• Click on the selected message(s), while holding down the left mouse button; pull your mouse to your file folders in the tree view. Move your mouse over the folder in which you would like to deposit your message(s), and let go of the left mouse button. As you are moving the mouse, a box will appear alerting you of 2 things. First, if it is a single message being moved it will show you the name of the message, but if you are moving multiple messages, the number of messages being moved will be shown. It will also have a red "X" or a green check mark. The "X" will be shown until your mouse is above a folder that can receive messages; at that time it will change to the check mark, letting you know it is ok to move messages to that particular folder.

Deleting a message - This is signified with a recycle bin and will allow you to perform 4 actions—Delete, Undelete, Purge Marked as Deleted, and Delete All Messages in Folder. This action can be performed three different ways after you select the message(s) you would like to move, or

• Delete - Deletes the selected mail. The action taken when a message is deleted is dependant upon the option chosen in 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.
• Purge Marked as Deleted - 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.

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.

Create a New 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 field that is absolutely required to send an email is the To address.

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.

Cancel - Cancels the new message and returns you to where you came from. Clicking the Cancel icon will delete the draft you were working even if you have not clicked the Save as Draft icon.

Tabs

Options - Click on this tab to request a read receipt and/or declare what the importance level of this message is Normal, Low, or High. Normal is the default level chosen.

Attachments - Click on this tab to add attachments to your email. Remember to hit Upload once you have found the file what you want to attach. Please bear in mind that there are limits to the size of attachments imposed by many email systems on the internet today.

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.

Note: When entering addresses into the "To:", "Cc:", and "Bcc:" fields, SmarterMail will auto-complete addresses when possible by referencing your contacts list or the Global Address List (GAL)if applicable.

Subject - Enter the primary subject of the message.

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.

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.

At the top right hand corner of the reading pane, there are four icons—Reply, Reply All, Forward, and Print. Each of these icons are actions that can be performed on the message you are currently viewing. To the left of 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

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 - Opens up a new window and allows you to forward this message to someone else. The method used to forward the message can be customized by several settings in the Settings page.

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

Email Information Header

Date - Time and date the message was sent.

From - Email address from which the message was sent.

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

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.

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 Account Settings page.

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.

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 icon from the actions toolbar. 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 the current folder, the current folder and subfolders, or all folders to search.

Messages to search - You have the option of searching All Messages, Unread messages, Replied to messages, or Forwarded messages.

Time Period - You have the option of choosing the time frame of which you received the messages. You can choose from the Last 30 Days, 90 Days, 6 Months, 12 Months, or All Time.

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. If you want to start a new search with new criteria, click the Clear button.

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 icon from the actions toolbar. Second, you can delete multiple messages at once by checking them in the message list page and clicking the Delete icon from the actions toolbar.

The action SmarterMail takes when you delete a message depends on the option you choose in Settings page. 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 Folder Auto-Clean .

Manage 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.

To add or edit your email folders simply click on the Email icon on the main toolbar.

My Folders

Adding a Folder - A folder can be added a couple different ways. You can click the Plus Sign icon on the Folder toolbar; or move your mouse above a current folder, right-click, and choose New Folder . In both instances a new window will pop-up, allowing you to name your new folder.

Go To Folder - Click on a folder name to see the messages contained in the folder.

Rename a Folder - You can rename a folder by clicking on the folder you would like to rename and then clicking the Pencil icon on the Folder toolbar; or by moving your mouse over the folder that you would like to rename, right-click, and choose Edit . A new window will pop-up showing the current name of the folder, and a blank space will be available for a new folder name. Renaming folders is unavailable on folders that have specific purposes, like Inbox or Deleted Items.

Delete a Folder - First choose the folder you would like to delete. Then either click the Trash Can icon on the folder toolbar; or right-click and choose Delete . A new window will pop-up asking you to confirm your deletion. At that point you may either continue with the delete, or cancel it. Deleting folders is unavailable on folders that have specific purposes, like Inbox or Deleted Items.

Entering a Folder Name

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", which is located on the top of the New Message pop up screen. Choosing this option will save the email in this folder, but after a certain amount of time (which can be set by the user), it will automatically save to the Drafts 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 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 Settings. Note that email sent from an email client, like Outlook Express, will not get saved in this folder.

Related Topics

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

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. More Info

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

Auto-Responders - The auto-responder is an automated message that will be sent as a reply to all incoming email messages. More Info

Spam Filtering - SmarterMail includes many advanced Anti-Spam measures that will help keep your inbox free of unwanted mail. More Info

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. More Info

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. More Info

Webmail Settings - The options in the Account Settings page allow end users to customize the way SmarterMail works for them. More Info

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 Collaborate button on the main toolbar, then select the Contacts control bar in the left pane.

Manage 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.

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

Delete 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.

Search 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.

Export Contacts - For information about exporting contacts, see Exporting Contacts .

Import 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 .

Create a New Contact

There are two methods of adding a new contact:

- Click the Collaborate button on the main toolbar, then click the Contacts control bar, and finally click New Contact from the left tree view; or
- Click the Collaborate button on the main toolbar, then click the Contacts control bar, then click All Contacts from the My Contacts tree view, and finally click the New icon from the actions toolbar.

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

Personal Info

- Display Name
- Title (Mr./Mrs./etc.)
- First Name
- Middle Name
- Last Name
- Suffix
- Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers

- Fax Numbers
- Address Information

Company Info

- Company 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

Exporting Contacts

Contacts can be exported in an easy fashion in SmarterMail. When viewing a contact list like All Contacts or the Global Address List (Enterprise Only) , move your mouse over the Import/Export button. Choose one of the options from the drop down list—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

- Click All Contacts from the My Contacts tree view.
- Move your mouse over the Import/Export icon from the actions toolbar 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

• Click All Contacts from the My Contacts tree view.

• Move your mouse over the Import/Export icon from the actions toolbar 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.

Global Address List

This feature is available in Enterprise Edition only

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, click on the Settings button, click the Settings control bar in the left pane and choose Account Profile in the My Settings tree.

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.

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

This feature is available in Enterprise Edition only

Calendars and contact lists can be loaded into Outlook and displayed side-by-side with your existing Outlook calendars 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 icon from the actions toolbar.
- 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.

SmarterMail Sync

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. More Info on SmarterMail Sync.

Sharing

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

Calendar

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 Collaborate on the main toolbar, and then click the Calendar control bar in the left pane.

My Calendar

To get started working with your calendar, click the Collaborate button on the main toolbar, and then click on the Calendar control bar in the left pane. There are three primary views of calendars in SmarterMail: Daily, Weekly, and Monthly. These views are very similar, but have a few differences, which are noted below.

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

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).
 • 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.
 • 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.

Create a New Appointment

There are two methods of adding a new appointment to a calendar:

 • Click the Collaborate button on the main toolbar, then click the Calendar control bar in the left pane, and finally click New Appointment from the left tree view; or
 • Click the Collaborate button on the main toolbar, then click the Calendar control bar, then select the calendar you want to view (Daily, Weekly, or Monthly), and finally click the Add Appointment icon from the actions toolbar.

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

Appointment

The Appointment tab records the common information about the appointment. 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.
 • Attendees - Enter the email addresses of the people who you want to have attend this event. 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. You can also check your attendees' availability by clicking on the Availability link to the right of the box. (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.

• 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. You may click the calendar and/or the clock to the right of the box to help with this.

• End Date and Time - If the appointment does not have a scheduled end time, you may leave the end time blank.

• Reminder - This will allow you to choose if you want to be notified with an email, and at what time before the event starts. For more information about reminders, please see the help topic Reminders .

• Email Notification - Enter the email address that you would like notified of this appointment.

Note: Appointments will span multiple days and times 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 .

Description

Enter the full description of the appointment, if needed.

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.

Recurring events

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

• Personal Occasions (Birthdays, Anniversaries)

• Holidays

• Regular Meetings/Business Appointments

• Important Reminders (Seasonal Appointments)

• Much More

When 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 in the Appointments tab when making a New Appointment. When a reminder is activated, a popup window will appear that reminds you of the event. At the bottom of the popup window you have the following options☐Snooze,Dismiss All, Dismiss, and Close the Window.

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

This feature is available in Enterprise Edition only

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

To enable the connection, you must first have Outlook installed and available to your user account. Outlook will keep the calendar from the previous month, the current month, and 3 future months.

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 icon from the actions toolbar.

• 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.

SmarterMail Sync

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. More Info on SmarterMail Sync.

Sharing

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

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, click the Collaborate button on the main toolbar, and then select the Task control bar in the left side bar.

Manage Tasks

The My Tasks page lists all of your tasks in one place and lets you sort and track them easily. To view your tasks, click the Collaborate button on the main toolbar, then click the Tasks control bar, and finally select All Tasks from the My Tasks tree view.

The My Tasks page lists all of your tasks and lets you perform many actions:

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

• Select the task you want to edit and click the Edit icon from the actions toolbar; or

• Right click the task you want to edit and select Edit from the drop down list; or

• Double-click the task you want to edit

• Deleting a Task - This can be accomplished two different ways:

• Select the task you want to delete and click the Delete icon from the actions toolbar; or

• Right click the task you want to delete and select Delete from the drop down list

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

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

Create a New Task

To add a task to your task list, either click on New Task in the tree view on the left hand side, or click the New icon on the actions toolbar

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 icon from within the page.

Details

• 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.

• Priority - Higher priority tasks are more important. In My Tasks, you can sort by priority.

• 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.

• % Complete - This indicates the percentage that the task is completed.

Description

Enter the full description of the task, if needed.

Categories

You may assign one or more categories to each note to make for easier searching.

• To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

Outlook Integration

SmarterMail Sync

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. More Info on SmarterMail Sync.

Sharing

Sharing a resource, such as a calendar, contacts, notes, tasks, or e-mail folders, will allow the users you specify to access the resource with a pre-determined permission level. More Info on Shared 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 colors to choose from
- The ability to assign a category to a note

To get started, click the Collaborate button on the main toolbar, and then select the Notes control bar in the left side bar.

Manage 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.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Note - This can be accomplished three different ways:

- Select the note you want to edit and click the Edit icon from the actions toolbar; or
- Right click the note you want to edit and select Edit from the drop down list; or

- Double-click the note you want to edit
- Deleting a Note - This can be accomplished two different ways:

- Select the note you want to delete and click the Delete icon from the actions toolbar; or
- Right click the note you want to delete and select Delete from the drop down list
- Sharing Notes with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic Sharing Your Own Resources .
- To search your notes, click the Search icon on the action toolbar. This will open up a search toolbar below the actions toolbar which will allow you to search.

Create a New Note

To create a new note, either click on New Note in the tree view on the left hand side, or click the New icon on the actions toolbar.

- 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.

- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

Outlook Integration

SmarterMail Sync

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. More Info on SmarterMail Sync.

Sharing

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

RSS Feeds

RSS Feed Overview

The SmarterMail web interface contains a sophisticated news feed aggregator. Use the RSS tree, by clicking on the Workspace button in the main toolbar. 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.

Editing an RSS Feed

This can be accomplished three different ways:

- Select the feed you would like to edit and click the Edit icon from the actions toolbar, or
- Right click the feed you would like to edit and select Edit from the drop down list, or
- Double-click the feed you would like to edit

Deleting an RSS Feed

This can be accomplished two different ways:

- Select the feed you would like to delete and click the Delete icon from the actions toolbar, or
- Right click the feed you would like to delete and select Delete from the drop down list

Subscribe to a New Feed

To get started with an RSS feed; click the Workspace button on the main toolbar, then select Root from the tree view. This will display a list of your RSS Feeds.

Click a specific RSS Feed in the Root folder to view the contents of that feed.

Subscribe to a New Feed

This can be accomplished two different ways:

- Click New Feed from the left tree view, or
- Click the New icon from the actions toolbar.

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.

News and Finance	Technology
• Fox News [feed-list]	• PC Magazine: New Product Reviews
• CNN News [feed-list]	• Slashdot News
• Yahoo! News [feed-list]	• TheWHIR Web Host News
• Reuters News Online [feed-list]	• Wired News
• CNET News [feed-list]	• AnandTech's DailyTech News
• Washington Post [feed-list]	• eWEEK Windows News
• BBC News	Sports
Entertainment	• ESPN News
• Tapestry Comics [feed-list]	• Fox Sports
• NY Times: Opinion	• CBS SportsLine [feed-list]
• Dictionary word of the day	• NY Times: Sports
Finance	
• Kiplinger Personal Finance	
• SmartMoney	

Manage RSS Folders

Adding a Folder - A folder can be added a couple different ways. You can click the Plus Sign icon on the Folder toolbar; or move your mouse above a current folder, right-click, and choose New Folder . In both instances a new window will pop-up, allowing you to name your new folder.

Go To Folder - Click on a folder name to see the messages contained in the folder.

Rename a Folder - You can rename a folder by clicking on the folder you would like to rename and then clicking the Pencil icon on the Folder toolbar; or by moving your mouse over the folder that you would like to rename, right-click, and choose Edit . A new window will pop-up showing the current name of the folder, and a blank space will be available for a new folder name.

Delete a Folder - First choose the folder you would like to delete. Then either click the Trash Can icon on the folder toolbar; or right-click and choose Delete . A new window will pop-up asking you to confirm your deletion. At that point you may either continue with the delete, or cancel it.

Settings

Account Settings

The options in the Account Settings page allow end users to customize the way SmarterMail works for them. No changes are saved until you click on the Save icon in the upper left hand corner of the Action Bar. The options are each explained below, separated by the tab on which they reside.

To get started, click the Settings button on the main toolbar, and then select Account Settings under the My Settings tree view.

User

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

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

Reply-to Email 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. Your selection of the zone will impact how SmarterMail sends calendar items to others and how they are received by you.

Disable 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.

- 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 blocks the mail from the sender's mail server with a message saying try again later. The sending server will then retry sending the mail a few minutes later. 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.

Webmail

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

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.

Sort messages by - When viewing the messages in a folder, they will be sorted according to the option

chosen in this drop down. Your options are To,From, Subject, Size, or Date. By default, messages are sorted by date in descending order.

Auto Refresh Rate - The amount of time chosen in this box will determine the frequency that your page will refresh automatically. If "Never" is chosen, you will be required to click the Refresh icon in the upper right hand corner of the actions toolbar to determine if any new mail has arrived.

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

Upcoming Appointments - This allows you to set the number of days you would like displayed when you select Upcoming Appointment in the My Calendar tree view and on My Today Page.

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 help 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.

Preview Pane - This allows you to choose where you would like the preview pane displayed Right side or Bottom. You can also choose to disable this feature, which will then require you to double click an email to view it.

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

Enable Automatic Preview - When this is checked a preview panel will display the first message available in the folder you are currently viewing.

Disable automatic image loading in the preview pane - Check this box if you do not want messages to show images when viewing them in the preview pane.

Disable scroll bars in pulldown 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.

Enable popups when reading messages - When this is checked, your message will appear in a new popup window when a message is selected and double-clicked.

Enable popups when editing calendars - Enable this to have the ability to edit all calendar entries within a popup window.

Enable popups when editing contacts - Enable this to have the ability to edit contacts within a popup window.

Enable popups when editing notes - Enable this to have the ability to edit notes within a popup window.

Enable popups when editing tasks - Enable this to have the ability to edit tasks within a popup window.

Enable automatic popup when new reminders occur - When this is checked all reminders will appear in a new popup window rather than embedded.

Disable reminders for appointments and tasks - When this is checked you will not be reminded of upcoming appointments or tasks.

Enable Sounds - Checking this box will allow sound throughout SmarterMail.

Compose

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.

Compose Font - This is the default font (type & size) that will be used when you are composing a message.

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.

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.

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.

Auto Save Frequency - When composing a new message, this will establish how often your message is saved automatically—Do not auto-save, 1 minute, 2 minutes, 3 minutes, or 5 minutes

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.

Enable 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.

Enable popup for new messages and replies - Composing a new message or replying to a message will be performed in a separate pop up window.

Enable read receipts by default - Checking this will make read receipts for outgoing email your default.

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.

Enable Deletion of messages on forward - Enable this to delete the message from the inbox of the original email account after forwarding it to the new email address.

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 .

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.

Enable Plus Addressing - Enable this to accept emails into the folder you specified.

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.

Account 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 in Enterprise Edition.

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

To get started, click the Settings button on the main toolbar, and then select Account Profile under the My Settings tree view.

Personal Info

> • Display Name
> • Title (Mr./Mrs./etc.)
> • First Name

- Middle Name

- Last Name

- Other Email Address

- Instant Messenger

- Home Page

- Date of Birth

- Additional Info

Contact Info

- Phone Numbers

- Fax Numbers

- Address

- City

- State

- Postal Code

- Country

Company Info

- Company Name

- Job Title

- Department

- Office

- Address

- City

- State

- Postal Code

- Country

- Website

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

The Notification Profiles page lists all of your profiles and lets you perform many actions, like adding a new profile, edit, delete, or search.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

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.

To get started, click the Settings button on the main toolbar, and then select Auto-Responder under the My Settings tree view.

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.

Disable responses to indirect mail - By checking this box, only mail sent directly to you will receive your auto-responder. Any mail you receive through a mailing list, forward, or an alias will not trigger your auto-responder.

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."

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.

To get started, click the Settings button from the main toolbar, then select POP Retrieval from the My Settings tree view.

Click the New icon from the actions toolbar to add a new POP Retrieval account. You will be presented with these options:

- Server Address
- Port
- Username
- Password
- Enable APOP Authentication

- Leave Messages on Server
- Requires SSL
- Destination Folder

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.

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.
- Click the Settings button on the main toolbar and choose Account Settings from the My Settings tree view.
- 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.

Filtering

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.

To check your possible options, click the Settings button on the main toolbar, then select Folder Auto-Clean from the Filtering folders tree view.

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 use the auto-clean feature, 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, you have the option of auto-cleaning folders based upon size or date.

These options will be visible if size is chosen:

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

These options will be visible if date is chosen:

- Mail Age - Enter the maximum number of days mail will stay in the current folder. Once a message reaches that age, it will be deleted.
- Enable auto-clean for this folder - If this box is checked, then auto-clean will be active for the specified folder.

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.

To get started, click the Settings button on the main toolbar, and then select Content Filtering in the Filtering folder under the My Settings tree view.

Adding a Filter - Clicking the New Filter icon on the Action toolbar starts the Content Filter Wizard which is explained in more detail below.

Editing a Filter - Click on a filter's row then click the Edit icon in the Action tool bar, or right click and select Edit .

Deleting a Filter - Click on a filter's row then click the Delete icon in the Action t ool bar, or right click and select Delete .

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 New 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 criterion 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

• Message over Size

• Message under Size

• Received in Date Range

• Sent through a Specific Server (by IP)

• Spam Probability

• Flagged as High Priority

• Flagged as Normal Priority

• Flagged as Low Priority

• Message is Automated (no return address)

Spam Filtering

SmarterMail includes many advanced Anti-Spam measures that will help keep your inbox free of unwanted mail. Your domain administrator has probably already set up some basic spam options.

To get started, click the Settings button on the main toolbar, and then select Spam Filtering in the Filtering folder under the My Settings tree view.

Options

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

Sharing

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
- Notes

Items that you are sharing with others are called Shared Resources. Items you are connected to on others' accounts are called Mapped Resources.

Shared 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:

- To get started, click the Settings button on the main toolbar, and then select Shared Resources in the Sharing folder under the My Settings tree view.
- Click on the New icon in the Actions toolbar.
- 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.

Mapped 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:

- To get started, click the Settings button on the main toolbar, and then select Mapped Resources in the Sharing folder under the My Settings tree view.
- You will be presented with a list of all currently attached resources.
- You can search for resources by name, or find one in the list and click on the Attach button.
- Enter a friendly name for the resource and click the Save icon.

The resource will now be available in the sidebar.

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

Help for Domain Administrators

Domain Settings

Domain General Settings

The Domain General Settings page allows the Domain Administrator to make changes that will affect the entire domain.

Skin

If the system administrator has allowed domains to override the default skin, a Skin tab will appear on this page.

Default Skin - Select the skin you wish to set as the domain default from the list or select Use Server Default to use the default server skin.

Enable Users to Override Skin - Checking this will allow users to set their own skin

Sharing

Enable public availability for all users - Enable this to give all end users the ability to share calendars, task, notes, and contacts publicly.

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 by clicking the Settings button on the main toolbar, then select Users in the Accounts folder under the Domain Settings tree view.

- • New - Clicking this icon will let you add a new email user. More information about adding users can be found in the topic Adding a User Account from the Domain Admin folder.
- • Edit a User - Editing an account can be done three different ways—Clicking the Edit icon on the actions toolbar, right-click on the user you want to edit and then select Edit , or double-clicking the desired user.
- • Deleting a User - To delete an account, select the user you want to delete and click the Delete icon, or right-click the user you want to delete and select Delete in the drop down menu. Note: Deletions are permanent, and once a user is deleted, the mail cannot be retrieved from it.

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 - Click the New icon on the actions toolbar to begin the process of adding a new alias. More information about adding aliases can be found in the topic Adding a User Alias .

Edit an Alias - Edit an alias by clicking on the name of the alias in the table and selecting the Edit icon from the actions toolbar, or right-click over a selected alias and select Edit , or double click the name of the alias.

Deleting an Alias - To delete an alias, select the alias you would like to delete and then either click the Delete icon from the actions toolbar, or right-click above the alias and select Delete .

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.

Domain Content Filtering

Domain content filtering allows you to create the same types of content filters as you can in 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 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.

To get started, click the Settings button on the main toolbar, and then select Spam Filtering under the Filtering folder in the Domain Settings tree view.

Options

- 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 (Sender Policy Framework) 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.

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 block lists
- Collaborative filtering databases

When should you use SpamAssassin? SpamAssassin in conjunction with Greylisting is as good as any available product on the market when you care about limiting spam from getting to your mailbox.

For more information on SpamAssassin, see SmarterTools deployment guides.

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 icon from the actions toolbar.

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

Advanced Settings

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.

To get started, click the Settings button on the main toolbar, and then select Domain Aliases under the Filtering folder in the Domain Settings tree view.

Notes:

> • Messages cannot 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.

DomainKeys

DomainKeys is an e-mail authentication system designed to verify the DNS domain of an e-mail sender and the message integrity. To get started with DomainKeys, click the Settings button from the main toolbar and then select DomainKeys from the Advanced Settings folder in the left tree view.

No setting will be saved until you click the Save icon from the actions tool bar.

Note: You must be signed in as the Domain Administrator to configure DomainKeys.

Options

Enable DomainKey Signing - Enable this to have DomainKey Signing capabilities. If you do not enable this, the other two tabs, Certificate and Signing, will not be available.

Certificate

Selector - Enter any name you would like in this field. It is recommended the key is changed once every 12 months.

Key Size - Select the size of the key from the drop down list you would like to use. The larger the key, the stronger it is.

Generate Key - Click the Generate Key from the actions toolbar to populate the Record Name and Record Value.

Signing

Canonicalization - Choose from the drop down list how strict you want the system to monitor messages while in transit.

nofws - This is the default and will allow basic intransit changes to messages.

Simple - This is more strict and will not allow as many intransit changes to messages.

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.

To get started, click the Settings button on the main toolbar, and then select Folder Auto Clean under the Filtering folder in the My Settings tree view .

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.

Enable users to override auto-clean settings - Enable this to allow end users to declare their own auto clean settings.

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, click the Add Rule icon on the actions toolbar to get started.

Folder - Select the folder you would like to set auto-clean settings for.

Type - This will allow you to choose what rule you want the auto clean to follow, size or date.

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.

User Groups

This feature is available in Enterprise Edition only

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.

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.

User Propagation

Domain Administrators have the ability to make changes to their domain and then carry those changes to a specific user, or can implement those changes for all users on their domain.

To get started, click the Settings button on the main toolbar, then select User Propagation from the Advanced Settings tree view.

Once all changes are made to your satisfaction, click the Propagate Now icon from the actions toolbar. This will make all changes for either your use you specified or the entire domain.

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 the Settings button on the main tool bar, then select Mailing Lists in the Domain Settings tree view. This will take you to a page that lists all of the mailing lists in the domain.

Adding a List - Click on the New 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 can be done three different ways. First select the mailing list you would like to edit, then either click the Edit icon on the actions toolbar or right-click on the selected list and choose Edit from the drop down list. You can also double-click on a mailing list in which you would like to edit.

Deleting a List - To delete a mailing list, select the list which you would like to delete and click Delete on the actions toolbar, or right-click the selected list and choose Delete from the drop down list. A confirmation page will appear. Note: Once a list is deleted, it is not recoverable.

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.

To get started, click the Settings button on the main toolbar, then select Mailing Lists in the Domain Settings tree view. To add a new mailing list, click the New icon on the actions toolbar.

List Settings

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

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

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. You can choose to enable this field by clicking the box.

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). (Default is 200)

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.

Disable Mailing List - Check this box to disable the mailing list.

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

Options

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 Replies 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 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.

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

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 .

Subscribe Email

Insert the contents of the email that you would like sent in response to new subscriptions performed through list serv commands.

Throttling

Throttling allows System Administrators to limit the number of messages and/or how much bandwidth a domain, user, or mailing list can use for sending email per hour.

Messages per Hour - Enable this and enter the number of messages a domain is allowed to send per hour. (Default is set at 5000)

Bandwidth per Hour - Enable this and enter the maximum size in MB a domain is allowed to send per hour. (Default is set at 100)

List Subscribers

List subscribers are those email addresses that will receive list posts. To modify the subscribers for a mailing list, either select the list and click the Edit icon on the actions menu, right-click the selected list and choose Edit from the drop-down list, or double click a selected list. You will see three icons on the actions tool bar, move your mouse over the Subscribers icon and select Subscribers from the drop-down list.

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 - Click on this icon 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.

Delete - Select an email and click on the Delete icon on the actions toolbar to remove it from 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

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.

Options

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, either select the list and click the Edit icon on the actions menu, right-click the selected list and choose Edit from the drop-down list, or double click a selected list. You will see three icons on the actions toolbar, move your mouse over the Subscribers icon and select Digest Subscribers from the drop-down list.

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 - 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.

Delete - Select an email and click on the Delete icon on the actions toolbar to remove it from 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

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 - 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.

Delete - Select an email and click on the Delete icon on the actions toolbar to remove it from 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

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

Subscription Email

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, click the Settings button on the main toolbar, then select Mailing Lists in the Domain Settings tree view. This will show you a list of your current Mail Lists. Select the list you would like to edit the Subscription E-Mail by clicking on it and then clicking the Edit icon on the actions toolbar, right-clicking and then selecting Edit in the drop down list, or double-clicking it. Once you are in the edit screen, click the Subscribe Email tab.

Help Email

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, click the Settings button on the main toolbar, then select Mailing Lists in the Domain Settings tree view. This will show you a list of your current Mail Lists. Select the list you would like to edit the Help File by clicking on it and then clicking the Edit icon on the actions toolbar, right-clicking and then selecting Edit in the drop down list, or double-clicking it. Once you are in the edit screen, click the Help File tab.

Additional Help Topics

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.

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.
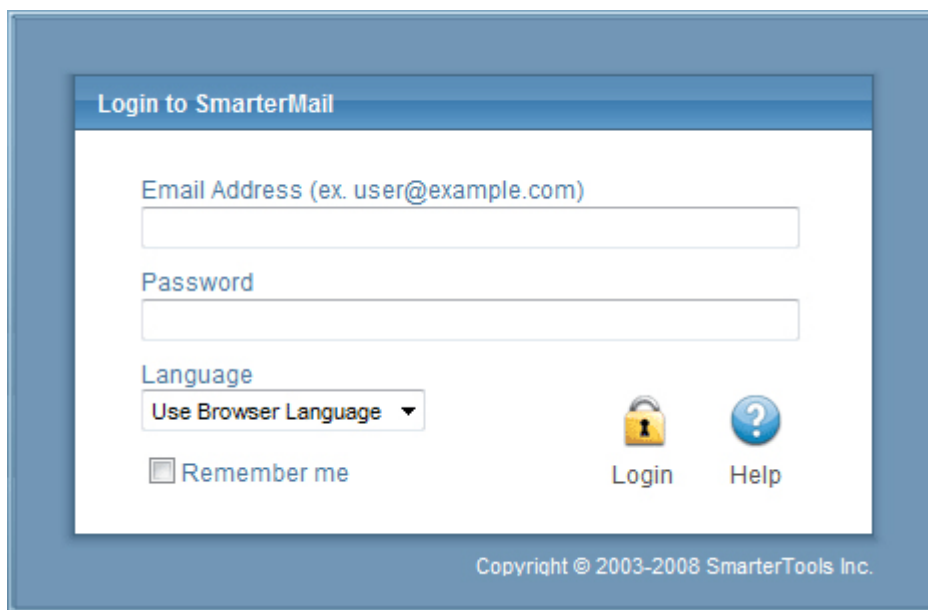
To set a catch-all alias, first create an alias in your domain to be the catch-all. Then click the Settings button on the main toolbar and select Alias in the Accounts folder under the Domain Settings tree view. Click the Set Catch-All icon on the action toolbar and choose the alias you wish to use as the catch-all, and click on the Save icon from the actions toolbar.

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

Help for System Administrators

How to Login - 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.

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).

By checking the "Remember Me" 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.

Manage

Managing Domains

A single, centralized page lets you do most of the management of your domains.

Arrive at this screen by clicking the Manage button on the main toolbar. The parts of this multi-use screen are described in detail below.

Common Tasks

New Domain Icon - Click the New Domain icon on the actions toolbar, or in the tree view on the left side to begin the New Domain Wizard. more info

Edit Icon - You can edit a domain three different ways—Using the Edit icon on the actions toolbar, right-clicking a selecting domain and selecting Edit from the drop down list, or double-clicking a selected domain. more info

Settings Icon - This will allow you to quickly make changes to certain fields, such as—Email Users, Email Aliases, Mailing Lists, Default User Settings, Spam Filtering, Content Filtering, Folder Auto-Clean, and Domain Aliases.

Delete Icon - You can delete a domain two different ways Select a domain and then click the Delete icon on the actions toolbar or right-click on a selected domain and choose Delete from the drop down list. 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.

Impersonate Icon - This will allow System Admins to log in as a Domain Administrator or a user within their server.

Settings Icon list

Users - This choice lets you manage users in the domain.

Aliases - This choice lets you manage aliases that map to email accounts in the domain.

Mailing Lists - Administrate mailing lists for the domain with this item.

Default User Settings - This allows you to set the general settings for a domain.

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

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

Folder Auto-Clean - This will allow you to set the guidelines for the auto-clean feature at that Domain Administrator level.

Domain Aliases - Manage the domain aliases with this item.

Adding a Domain

Add a domain by clicking the Manage button on the main toolbar and then selecting New Domain in the tree view or by clicking the New icon on the action toolbar.

No changes will be applied on any page until the Save button is clicked.

Options

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.

IP Address - 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.

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

Mail List Username - This is the email address that List Serv commands can be sent to via email.

Domain Administrator 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.

Domain Administrator Password - Enter the domain administrator's password for SmarterMail

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.

Technical Information

SMTP Port - Simple Mail Transfer Protocol (SMTP) uses port 25 on the server as a default. 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 utilize a firewall that requires this setting to be changed.

SMTP Port (Alternate) - Enable alternate SMTP port which 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 both the SMTP port and the alternate SMTP port, as both will be available simultaneously.

POP Port - Post Office Protocol (POP3) uses port 110 on the server as a default. 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 port 143 on the server as a default. 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 port 389 on the server as a default. 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 utilize a firewall that requires this setting to be changed.

Logout URL - - Enable logout URL and you can enter any site which you would like your users redirected to when logging off.

Auto-Responder Exclusions - This allows you to choose who will receive an auto-responder based on the spam level of the original message.

Forwarding Exclusions - This allows you to choose what mail can be forwarded based on the spam level of the message.

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 .

Enable once per day per sender auto-responder restriction - Enable this if you want to put a restriction on the autoresponder frequency.

Disable 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.

Features

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.

Enable Calendar - Enable this to allow users to use the calendar feature.

Enable Contacts - Enable this to allow users to use the contacts feature.

Enable Domain Aliases - Enable this to show the "Domain Aliases" option in the Config menu for domain administrators. This will allow domain administrators to combine email addresses with different domain names into one mailbox. more info

Enable Content Filtering - 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 DomainKey Signing - Enable this to have you mail checked against a key to verify the mail is coming from who it says it is. Domain Administrators will configure this option once enabled.

Enable Domain Reports - Enable this to provide additional reports for domain administrators.

Enable Email Reports - Enable this to provide the ability to email reports

Enable Mailing Lists - Enable this to show the "Mailing Lists" page in the Config menu for domain administrators. This will allow domain administrators to use the list serv features for sending emails via lists to many users. more info

Enable Notes - Enable this to allow users to use the notes feature.

Enable POP Retrieval - Enable this to allow users to pull their email from exterior accounts (yahoo, Gmail, etc.).

Enable Tasks - Enable this to allow users to use the tasks feature.

Enable Catch-Alls - Enable this to allow users to use catch-alls.

Limits

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

Disk Space - Enter 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. (Default is 500 MB)(Use 0 for unlimited)

Domain Aliases - Enter the maximum amount of Domain Aliases allowed for this domain. (Default is 2)(Use 0 for unlimited)

Users - Enter the maximum number of user email accounts that can be added to this domain. (Default is 100)(Use 0 for unlimited)

User Aliases - Enter the maximum number of alias email accounts (forwarded to a true email account) that are allowed per domain. (Default is 1000)(Use 0 for unlimited)

Mailing Lists - Enter the maximum amount of mailing lists allowed for the domain. (Default is 0)(Use 0 for unlimited)

POP Retrieval Accounts - Enter the number of exterior accounts a user is allowed to have.(Default is 10)(Use 0 for unlimited)

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. (Default is 10,000 KB)(Use 0 for unlimited)

Recipients per Message - Enter the number of email addresses a user can send a message to at one time. (Default is 200)(Use 0 for unlimited)

Sharing

This page is available in Enterprise Edition only

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

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

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

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

Enable Shared Notes - Enable this to allow note lists to be shared with other users of the same domain.

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

Priority

This tab allows System Administrators to prioritize or deprioritize the remote delivery of certain messages. All messages default to a priority of 5 with a range of 1 to 10. Messages assigned a priority of 10 will have the highest priority and will be delivered first, while messages assigned a priority of 1 will have the lowest priority and will be delivered last.

The use of message delivery priorities also gives system administrators the ability to create automated actions based upon that priority. A common use would be to set up a separate specific outbound gateway to handle all mailing lists to avoid potential blacklisting of the primary IP and to efficiently deliver all messages. The system administrator could then assign all mailing lists a priority of 1, and would set up a gateway to handle only messages with a priority range of 1 to 1. (For more information on setting up a Gateway Server, see the Gateway Servers help page in the Settings folder.)

Standard Messages - Enable this and set a priority for any message sent by a domain that doesn't have another priority already affecting it.

Mailing Lists - Enable this and set a priority for a message being sent by a mailing list.

Priority When Over size - Enable thisand set a priority for messages that exceed the "Message Size Threshold".

Message Size Threshold - Enter the size in MB that you want to set as your Maximum Threshold. Default is set at 2 MB.

Auto-Responders - Enable this and set a priority for auto-responder messages being sent.

Email Reports - Enable this and set a priority for reports being emailed.

Event Emails - Enable this and set a priority for emails being set to remind users of upcoming events.

Second Delivery Attempt - Enable this and set a priority for emails that were not successfully sent on the first try.

Third Delivery Attempt - Enable this and set a priority for emails that were not successfully sent on the first and second tries.

Throttling

Throttling allows System Administrators to limit the number of messages and/or how much bandwidth a domain, user, or mailing list can use for sending email per hour. Once the throttling threshold is reached, messages will stop sending until that hour expired. At that time, the system will resume sending messages.

Messages per Hour - Enable this and enter the number of messages a domain is allowed to send per hour. (Default is set at 5000)

Bandwidth per Hour - Enable this and enter the maximum size in MB a domain is allowed to send per hour. (Default is set at 100)

Bounces Received per Hour - Enable this and enter the maximum number of bounces a domain can receive in an hour. (Default is set at 1000)

Events

System Administrators can choose which categories and event types they would like enabled for their events system. The categories are as follows: Alias, Collaborate, Email, Mailing List, Throttling, and User.

Alias

Enable Alias Added Event - Enable this to have "Alias Added" added as an event type.

Enable Alias Deleted Event - Enable this to have "Alias Deleted" added as an event type.

Collaborate

Enable Calendar Reminder Occurred Event - Enable this to have "Calendar Reminder Occurred" added as an event type.

Enable Task Reminder Occurred Event - Enable this to have "Task Reminder Occurred" added as an event type.

Email

Enable Message Received Event - Enable this to have "Message Received" added as an event type.

Enable Message Sent Event - Enable this to have "Message Sent" added as an event type.

Mailing List

Enable Mailing List Added Event - Enable this to have "Mailing List Added" added as an event type.

Enable Mailing List Deleted Event - Enable this to have "Mailing List Deleted" added as an event type.

Enable Message Sent to Mailing List Event - Enable this to have "Message Sent to Mailing List" added as an event type.

Throttling

Enable User Throttled Event - Enable this to have "User Throttled" added as an event type.

Enable Domain Throttled Event - Enable this to have "Domain Throttled" added as an event type.

User

Enable User Added Event - Enable this to have "User Added" added as an event type.

Enable User Deleted Event - Enable this to have "User Deleted" added as an event type.

Enable User Disk Space Used Event - Enable this to have "User Disk Space Used" added an event type.

Note: Setup DNS for the Domain

Return to Getting Started

Enabling and Disabling Services

Arrive at this page by clicking the Manage button on the main toolbar, then selecting Services from the left tree view. This page allows you to control which services are running for your mail server. Generally, all of these should be enabled.

On the actions toolbar, you will see two icons—Start and Stop. All services can be started and/or stopped two different ways.

Start - To start a service that is currently stopped, you can select the service(s) and click the Start icon on the actions toolbar, or right-click on the service(s) and select Start from the drop down menu.

Stop - To stop a service that is currently started, you can select the service(s) and click the Stop icon on the actions toolbar, or right-click on the service(s) and select Stop from the drop down menu. 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.

Protocol Types

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. SmarterMail will validate email addresses for user accounts, aliases, and mailing lists.

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.

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.

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

Editing Domains

Editing a domain can be initiated in three different ways. To get started, click the Manage button on the main toolbar. Then select the domain that you would like to edit and do one of three things: 1) Click the Edit icon on the action toolbar, 2) Right-click the selected domain and select Edit from the drop-down list, or 3) Double click the selected domain.

Editing a site is very similar to adding a new site. No changes will be applied on any page until the Save icon is clicked.

Options

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.

IP Address - 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.

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

Mail List Username - This is the email address that List Serv commands can be sent to via email.

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

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.

Technical Information

SMTP Port - Simple Mail Transfer Protocol (SMTP) uses a port 25 on the server as a default. 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) - Enable alternate SMTP port which 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 both the SMTP port and the alternate SMTP port, as both will be available simultaneously.

POP Port - Post Office Protocol (POP3) uses port 110 on the server as a default. 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 port 143 on the server as a default. 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 port 389 on the server as a default. 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.

Logout URL - - Enable logout URL and you can enter any site which you would like users redirected to when logging off.

Auto-Responder Exclusions - This allows you to choose who will receive an auto-responder based on the spam level of the original message.

Forwarding Exclusions - This allows you to choose what mail can be forwarded based on the spam level of the message.

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 .

Enable once per day per sender auto-responder restriction - Enable this if you want to put a restriction on the auto-responder frequency.

Disable 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.

Features

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.

Enable Calendar - Enable this to allow users to use the calendar feature.

Enable Contacts - Enable this to allow users to use the contacts feature.

Enable Domain Aliases - Enable this to show the "Domain Aliases" option in the Config menu for domain administrators. This will allow domain administrators to combine email addresses with different domain names into one mailbox.

Enable Content Filtering - Enable "Domain Content Filtering" in the Config menu for the domain admin. Content filtering is inherited by all end users within the domain.

Enable DomainKey Signing - Enable this to have you mail checked against a key to verify the mail is coming from who it says it is. Domain Administrators will configure this option once enabled.

Enable Domain Reports - Enable this to provide additional reports for domain administrators.

Enable Email Reports - Enable this to provide the ability to email reports

Enable Mailing Lists - Enable this to show the "Mailing Lists" page in the Config menu for domain administrators. This will allow domain administrators to use the list serv features for sending emails via lists to many users.

Enable Notes - Enable this to allow users to use the notes feature.

Enable POP Retrieval - Enable this to allow users to pull their email from exterior accounts (yahoo, Gmail, etc.).

Enable Tasks - Enable this to allow users to use the tasks feature.

Enable Catch-Alls - Enable this to allow users to use catch-alls.

Limits

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

Disk Space - Enter 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. (Default is 500)(Use 0 for unlimited)

Domain Aliases - Enter the maximum amount of Domain Aliases allowed for this domain. (Default is 2)(Use 0 for unlimited)

Users - Enter the maximum number of user email accounts that can be added to this domain. (Default is 100)(Use 0 for unlimited)

User Aliases - Enter the maximum number of alias email accounts (forwarded to a true email account) that are allowed per domain. (Default is 1000)(Use 0 for unlimited)

Mailing Lists - Enter the maximum amount of mailing lists allowed for the domain. (Default is 0)(Use 0 for unlimited)

POP Retrieval Accounts - Enter the number of exterior accounts a user is allowed to have. (Default is 10) (Use 0 for unlimited)

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. (Default is 10,000 KB)(Use 0 for unlimited)

Recipients per Message - Enter the number of email addresses a user can send a message to at one time. (Default is 200)(Use 0 for unlimited)

Sharing

This page is available in Enterprise Edition only

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

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

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

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

Enable Shared Notes - Enable this to allow note lists to be shared with other users of the same domain.

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

Priority

This tab allows System Administrators to prioritize or deprioritize the remote delivery of certain messages. All messages default to a priority of 5 with a range of 1 to 10. Messages assigned a priority of 10 will have the highest priority and will be delivered first, while messages assigned a priority of 1 will have the lowest priority and will be delivered last.

The use of message delivery priorities also gives system administrators the ability to create automated actions based upon that priority. A common use would be to set up a separate specific outbound gateway to handle all mailing lists to avoid potential blacklisting of the primary IP and to efficiently deliver all messages. The system administrator could then assign all mailing lists a priority of 1, and would set up a gateway to handle only messages with a priority range of 1 to 1. (For more information on setting up a Gateway Server, see the Gateway Servers help page in the Settings folder.)

Standard Messages - Enable this and set a priority for any message sent by a domain that doesn't have another priority already affecting it.

Mailing Lists - Enable this and set a priority for a message being sent by a mailing list.

Priority When Over size - Enable thisand set a priority for messages that exceed the "Message Size Threshold".

Message Size Threshold - Enter the size in MB that you want to set as your Maximum Threshold. Default is set at 2 MB.

Auto-Responders - Enable this and set a priority for auto-responder messages being sent.

Email Reports - Enable this and set a priority for reports being emailed.

Event Emails - Enable this and set a priority for emails being set to remind users of upcoming events.

Second Delivery Attempt - Enable this and set a priority for emails that were not successfully sent on the first try.

Third Delivery Attempt - Enable this and set a priority for emails that were not successfully sent on the first and second tries.

Throttling

Throttling allows System Administrators to limit the number of messages and/or how much bandwidth a domain, user, or mailing list can use for sending email per hour. Once the throttling threshold is reached, messages will stop sending until that that hour expired. At that time, the system will resume sending messages.

Messages per Hour - Enable this and enter the number of messages a domain is allowed to send per hour. (Default is set at 5000)

Bandwidth per Hour - Enable this and enter the maximum size in MB a domain is allowed to send per hour. (Default is set at 100)

Bounces Received per Hour - Enable this and enter the maximum number of bounces a domain can receive in an hour. (Default is set at 1000)

Events

System Administrators can choose which categories and event types they would like enabled for their events system. The categories are as follows: Alias, Collaborate, Email, Mailing List, Throttling, and User.

Alias

Enable Alias Added Event - Enable this to have "Alias Added" added as an event type.

Enable Alias Deleted Event - Enable this to have "Alias Deleted" added as an event type.

Collaborate

Enable Calendar Reminder Occurred Event - Enable this to have "Calendar Reminder Occurred" added as an event type.

Enable Task Reminder Occurred Event - Enable this to have "Task Reminder Occurred" added as an event type.

Email

Enable Message Received Event - Enable this to have "Message Received" added as an event type.

Enable Message Sent Event - Enable this to have "Message Sent" added as an event type.

Mailing List

Enable Mailing List Added Event - Enable this to have "Mailing List Added" added as an event type.

Enable Mailing List Deleted Event - Enable this to have "Mailing List Deleted" added as an event type.

Enable Message Sent to Mailing List Event - Enable this to have "Message Sent to Mailing List" added as an event type.

Throttling

Enable User Throttled Event - Enable this to have "User Throttled" added as an event type.

Enable Domain Throttled Event - Enable this to have "Domain Throttled" added as an event type.

User

Enable User Added Event - Enable this to have "User Added" added as an event type.

Enable User Deleted Event - Enable this to have "User Deleted" added as an event type.

Enable User Disk Space Used Event - Enable this to have "User Disk Space Used" added an event type.

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 cannot 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.

To get started, click the Manage button on the main toolbar, then select All Messages under the Spool tree view.

You have different actions which are available for you to chose located on the Actions toolbar— Force , Reset Retries , View , Recipients , Priority , Delete , and Refresh . See below for a description of each possible action.

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. When viewing a recipients, you can tell why they are pending.

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 Toolbar

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.

Force Messages - Forcing messages can be performed by either selecting the message you want forced and clicking the Force icon on the actions too bar, or right-clicking the message and selecting Force from the drop down menu. The statuses of the messages will not be updated until the server passes through the spool.

Reset 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.

View - Use this icon to show you that selected message.

Recipients - This will show you who the message was sent to and the status of that message (i.e. delivered or pending)

Priority - System Administrators can change the priority levels of specific messages.

Delete - Deleting messages can be performed by either selecting the message you want deleted and clicking the Delete icon on the actions too bar, or right-clicking the message and selecting Delete from

the drop down menu. No confirmation dialog will show up, so use caution when deleting from the spool.

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

User Activity

System Administrators have the ability to monitor the activity of all users on their server. Each user will be listed individually who is logged into the system. To get started with User Activity, click the Manage button from the main tool bar and then select Online Users from the User Activity tree view on the left side. They can monitor each user by the following variables:

Type - This will tell the System Admin whether they are connected with IMAP or Web mail.

IP Address - This will tell the IP Address of the user.

Start Date - This will tell the Start Date the user made the connection.

Duration - This will tell the total duration of the connection.

The System Administrator also have 3 actions he can perform from the actions tool bar&mdash: End Session , Disable User , and Search .

End Session - This will end the current session of any particular user.

Disable User - This will permanately disable the user from the system.

Search - This gives the System Admin the ability to search users on the system.

Inactive Users

System Administrators have the ability to search and find users who have been inactive from the system. To perform this search, click the Manage button from the main toolbar, and then select Inactive Users from the left tree view.

System Administrators have four options to choose from for the search&mdash: Inactive for 30 Days, Inactive for 90 Days, Inactive for 6 months, and Inactive for 12 months.

Current Connections

SmarterMail will monitor the server and see who is connecting via the different protocals&mdash: SMTP, IMAP, and POP. System Administrators can then blacklist a certain user by clicking the Blacklist icon on the actions toolbar if they believe a user is making too many connections.

Users can be viewed by All Connections from the left tree view, or by each protcol individually.

Current Blocks

SmarterMail will monitor the server and keep track of all users who are currently being blocked for SMTP, IMAP, POP, and LDAP.

Email harvesting can also be monitored, which is the process of obtaining lists of e-mail addresses using various methods for use in bulk e-mail or other purposes usually grouped as spam.

System Adminstrators can then click the Delete icon from the actions toolbar to remove anyone from the list.

Mass Messaging

SmarterMail gives System Administrators the opportunity to send mass emails and reminders to selected groups.

Send Email

To get started with a mass email, click the Manage button on the main toolbar, then select Send Email from the Mass Messaging tree view. After clicking Send Email you will be asked to populate the following fields:

From - Enter here who the email is from. "System Administrator" will be entered as a default.

To - Choose from the drop down menu who you want to receive the email. (All Users, All Users on Domain, All Domain Administrators, Specific User) If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.

Subject - Enter the subject of the email in this field.

Message - Enter the message you would like to send.

Once you complete all the fields, click the Send icon in the actions toolbar to send the message.

Send Reminder

To get started with a mass email, click the Manage button on the main toolbar, then select Send Reminder from the Mass Messaging tree view. After clicking Send Email you will be asked to populate the following fields:

To - Choose from the drop down menu who you want to receive the email. (All Users, All Users on Domain, All Domain Administrators, Specific User) If All Users on a Domain is chosen, you will then

be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.

Subject - Enter the subject of the email in this field.

Message - Enter the message you would like to send.

Once you complete all the fields, click the Send icon in the actions toolbar to send the message.

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, click the Manage button on the main toolbar and then click the Impersonate icon on the actions toolbar. A new window will pop up, and you will be logged in as the Domain Administrator. From there, you may edit user accounts, content filters, or whatever other part of the domain that needs to be changed.

For instructions on troubleshooting specific user accounts on a domain, please see the topic Troubleshooting an Email Account .

View Logs

This page allows administrators to get quick access to a domains log files. Administrators can view log files by utilizing this page, or they can download the selected log file as a .zip file by clicking the Download icon from the Actions toolbar.

Log file settings can be configured by clicking the Settings button from the main toolbar, and then selecting Log Settings from the left tree view.

Date - Enter the date which you would like to view log files from.

Type - Select the delivery method from the drop down box that you would like to analyze.

Search String - Enter a string of words that you would like to search.

Enable Related Traffic - Enable this box if you would only like data shown that occurred within the same session.

Note: SmarterMail will show logs files up to 1MB.

Settings

General Settings

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

To get started, click the Settings button on the main toolbar, then select General Settings from the Settings tree view.

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.

Items per Page - When viewing the messages in a folder, this option lets you customize how many items will appear per page throughout SmarterMail.

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).

Logout URL - Enable this feature to allow the System Administrator to redirect users who log out to a certain URL.

Enable Domain Admins to Override Logout URL - Enable this option to have domain admins select the URL they want their users to go to when logging out. If this option is not enabled, it will not be visible to domain admins.

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 are within the spool path and allow SmarterMail to work around the NTFS limitation of 30,000 objects in an individual folder. SmarterMail will utilize subspools by allocating up to 10,000 messages per subspool. (Default is 10)

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. (Default is 15 seconds)

Time Between Delivery Attempts - 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 attempts to resend emails before it is bounced. By default, this is set to 4 attempts - at 15min, 30min, 60 min, and 90 min intervals.

Attempts before bouncing DNS errors - Enter the maximum number of attempts SmarterMail should make before the message is bounced back due to a DNS error. This will happen most commonly with a misspelled domain. This will be beneficial for administrators because messages will not sit in the queue for long periods of time processing unnecessary messages and possibly slowing the system down. This will be helpful to users because messages will be bounced sooner and will give users the opportunity to fix any mistakes and get a message resent. (Default is 2. Setting this at 1 retry can be dangerous if the DNS server fails or if there is a loss of internet connectivity. To disable this feature, set the number of bounces equal to the number of message retry attempts which is determined in the line above TimeBetween Delivery Attempts)

Command-Line File to Run on New Mail - Enable this and enter the full path to an executable you wish to use to process incoming messages. Use %filepath as an argument to pass the path of the email file to the executable. It is allowable for the executable to delete the message to prevent delivery. Example: If you set this field to "c:\program files\myexe.exe %filepath", the program myexe.exe will be launched with the full path to the spool file as its first argument. 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 of 5 seconds should suffice.

Statistics

Delete Server Stats After - Enable this and enter the number of months that the server stats will be deleted. (Default is 13 months)

Delete Domain Stats After - Enable this and enter the number of months that the domain stats will be deleted. (Default is 13 months)

Delete User Stats After - Enable this and enter the number of months that the user stats will be deleted. (Default is 13 months)

Protocol Settings

This configuration page allows you to establish policies for the standard email protocols. No settings will be saved until you click the Save icon.

To get started, click the Settings button on the main toolbar, then select Protocol Settings from the Settings tree view.

POP

Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of minutes, the command will be aborted. (Default is 5 minutes)

Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. (Default is 8)

Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. Enter a "0" if you want unlimited connections. (Default is 500)

Pop Retrieval Download Path - System Admins can enter a path where mail will be stored from POP accounts until it is read.

Max Pop Retrieval Threads - Enter the maximum number of threads you want SmarterMail to work on concurrently. (Default is 10)

Pop Retrieval Interval - This is how often SmarterMail will check POP accounts based upon the amount of work needed to complete. (Default is 10)

IMAP

Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of minutes, the command will be aborted. (Default is 15 minutes)

Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. (Default is 8)

Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. Enter a "0" if you want unlimited connections. (Default is 1000)

Enable IDLE Command - Enable this 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.

SMTP In

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.

Session Timeout - Enable this and after a connection fails to respond or issue new commands for this number of minutes, the connection will be closed. (Default is 15 minutes)

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. (Default is 120 seconds)

Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. (Default is 8)

Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. (Default is 1000)

Max Hop Count - After a message gets delivered through this many mail servers, it is aborted by the software. This prevents looping due to DNS problems or misconfigurations. (Default is 20)

Max Message Size - Messages greater than this size will be rejected by the mail server. (Default is 30 MB)

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 - 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 - 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.

Disable relay settings when using SMTP authentication - This will disable the "Allow Relay" setting from above.

Enable Domain's SMTP auth setting for local deliveries - 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.

Disable AUTH LOGIN method for SMTP authentication - This will disable plain text authentication.

SMTP Out

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

Enable fallback to Primary IP on failure - Enable this to have SmarterMail automatically fallback to the primary IP when a failure has occurred. SmarterMail will only attempt to connect once if this option is enabled.

Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of seconds, the command will be aborted. (Default is 60 seconds)

Max Spam Check Threads - Enter the maximum number of messages that can be spam checked at one time.

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 cannot be sent right away. (Default is 50)

Hostnames

To get started with Hostnames, click the Manage button on the main toolbar, then select Hostnames from the left tree view.

This feature allows Administrators to assign a hostname for each IP address. For example: IP 1.1.1.1 can 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 .

To get started, click on the Settings button on the main toolbar, then select Domain Defaults from the Defaults tree view.

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 Settings from the main toolbar. Check all of the settings that you want to apply to your domains, then click on the Propagate Now icon.

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 get started, click the Settings button on the main toolbar, then select Log Settings from the Settings tree view. Settings will not be applied to any tab until you click the Save icon from the actions toolbar.

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 when enabled.

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).

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).

Event Log - The log level for event sessions (Default = Exceptions Only).

SycnML Log Level - The log level for SyncML 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).

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

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.

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, click the Settings button on the main toolbar, then choose Domain Forwarding from the Routing tree view and click the New Server icon on the actions toolbar.

IP Address - Enter the server that should receive the mail.

Disable Greylisting - This will disable greylisting for all mail being forwarded to the server.

Domains to Forward (one per line) - 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 any mail 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. Note: The target server does not need to be a SmarterMail Server.

The SmarterMail server can host local domains and act as a SmartHost server at the same time, allowing it to act as an incoming gateway server for those servers that are listed in the SmartHost settings and to act as the primary server for any domains that are set up locally in that SmarterMail server.

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

To get started, click on the Settings button on the main toolbar, then select SmartHost Servers from the Routing tree view.

> • 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 SmartHost 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 attempting 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 process 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.

To get started, click the Settings button on the main toolbar, then select Gateway Servers from the Routing tree view. You will see three icons on the actions toolbar—New, Edit, and Delete.

New - Click this button to add a Gateway Server.

Edit - This will allow you to edit an existing gateway server.

Delete - This will allow you to delete an existing gateway server.

Options

Server Address - Enable this and add the IP address of the Gateway Server.

Auth Username - Enable this and enter the username of the gateway server given to you by your ISP.

Auth Password - Enter a password for your gateway server.

Priority Range - Set the priority range for this server.

Enable SmarterMail Gateway Mode - Is this gateway another SmarterMail server.

SmarterMail Gateway

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 priviledge over users.

To get started, click the Settings button on the main toolbar, then select Folder Auto-Clean from the Defaults folder tree view.

Options (System Admin)

Enable domains to override auto-clean settings - Enable this 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.

Enable users to auto-clean inbox - Enable this feature to give users the ability to auto-clean their own inbox.

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.

Default Rules

Under each folder that has auto-clean options or if you click the New Rule icon, 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 New Rule button.

Enable Auto-clean for this folder - Enable this to auto-clean the folder when it gets too large.

Type - Choose which criteria to enforce auto-clean with:

• Size

• 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.
• Date - Choose the max number of days messages should stay in your folder.

Message Archiving

This feature is available in Enterprise Edition only

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.

To get started, click the Settings button on the main toolbar, then select Message Archiving from the Routing tree view.

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 New Rule icon.

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 none of your messages, all messages, incoming messages, or outgoing messages.

Skins

The SmarterMail Web interface contains built-in skins for your convenience.

The various skins can be found by clicking the Settings button on the main toolbar, then selecting Skins from the Interface folder tree view. Users can also create custom skins to emulate their own style or that of their company.

Default Skin - These are the available skins provided by SmarterMail.

Enable ability for domains to override skin - Enable this to allow Domain Admins to choose a skin for their domain.

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.

To get started, click the Security button on the main toolbar, then select Anti-Virus Administration from the Email Protection folder tree view.

Options

Enable ClamAV - Enable this to use ClamAV anti-virus scanning.

Enable Real-Time AV - Enable this to use Real-Time AV

Enable Command-Line AV - Enable this to use a command line virus scanner.

ClamAV

Clam AntiVirus is a 3rd party open source anti-virus toolkit, designed especially for scanning e-mail on mail gateways. For more information on ClamAV, visit: www.clamav.com

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

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

Timeout (in seconds) - System Admins can enter the maximum number of seconds they want to wait before moving on. (Default is 10 seconds)

Failures Before Restart - System Admins can enter the maximum number of timeouts allowed before ClamAV is restarted. (Default is 5)

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

Real-Time AV

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 receive 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

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.

To get started, click the Security button on the main toolbar, then select Anti-Spam Administration from the Email Protection tree view.

• 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 the Save icon.

The different types of Spam Checks are shown below. In most cases, clicking on the Edit icon 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. Declude addresses the major threats facing networks, and are handled by a multi-layered defense. Configuration of Declude is done through the Declude product, and all you need to do in SmarterMail is enable the spam check. Declude score will be included on spam line. Declude is a 3rd party open source and more information can be found at: www.declude.com .

SpamAssassin

SpamAssassin is a powerful, 3rd party open source mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. More information about SpamAssassin can be found at: spamassassin.apache.org .

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 by clicking the Security button on the main toolbar, then selecting SpamAssassin Servers from the Email Protection folder tree view. The Windows Version of SpamAssassin is limited to about 40,000 messages per day, if you anticipate more than this you may require the use of a distributed, multi-threaded version. Additional information is available in the SmarterTools SpamAssassin Deployment Guide.

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 SpamAssasasin 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. Bayesian Filtering "learns" from previous spam-marked messages to progressively improve performance. 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.

DomainKeys

DomainKeys is an e-mail authentication system designed to verify the DNS domain of an e-mail sender and the message integrity. The DomainKeys specification has adopted aspects of Identified Internet Mail to create an enhanced protocol called DomainKeys Identified Mail (DKIM).

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 probablility 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 widely adopted.

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 widely adopted.

Reverse DNS (Domain Name Sever)

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 (Real-Time Blacklists)

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 the Add List icon. 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.

Text to Add - This is the text that will be displayed when a message reaches a particular level of spam.

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.

Incoming Weight Threshold - Enable this and an incoming email must score this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)

Outgoing Weight Threshold - Enable this and an outgoing email must score this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)

Options

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-respond option to be as restrictive as your clients will permit.

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

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

Enable bounces for Outgoing SMTP Blocking - Enable this to give a user a notification when a mail message has not been sent due to spam.

Enable Spool Proc Folder - Enable this to have SmarterMail place messages into this folder to be analyzed in the background. While the messages are in the Spool Proc folder, .hdr can manipulate elements of the message, such as edit, write, and add headers. Once the scan has been completed, the message will be placed back into the spool and handled by SmarterMail from that point on.

Disable spam filtering on intra-domain email - Check this to disable spam filtering when messages are sent from from within the same domain (e.g. user1@example.com to user2@example.com).

Disable spam filtering on SMTP whitelisted IP Addresses - Check this to disable spam filtering on IP Addresses which have been added to a whitelist.

Enable Catch-All accounts to send auto-responders and bounce messages - Enable this if you rely on auto-responders being sent when a message comes in through a catch-all. In general, this is a bad idea, so it should be left unchecked unless your situation specifically requires it.

Bypass Gateways

This tab gives administrators the ability to enter an IP Address or an IP Range of an incoming gateway. SmarterMail will analyze the .EML file and pull the most recent IP Address from the header which will usually be an organizations incoming gateway. By inputting that IP Address on this page will allow SmarterMail to analyze the IP of the originating server rather than focusing on the gateway that SmarterMail received the message from. This is important because the majority of the time an organizations incoming gateway will not be listed on any RBL lists, but the originating server may be.

To add an IP Address or IP Range, click the Add IP icon from the Actions toolbar.

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.

To get started with Blacklists, click the Security button on the main tool bar, then select Blacklist from the Security folder tree view.

To get started with Whitelist, click the Security button on the main tool bar, then select Whitelist from the Security folder tree view.

Note: Whitelisted IP addresses are not subject to relay restrictions which you may have imposed. Exercise caution when granting whitelist status to a server, and be sure that you know what services on that server may send mail through your server.

New icon - Click on this button to add an IP address or an IP address range to the list.

Edit icon - Click on a row to edit the whitelist or blacklist settings for the entry.

Delete icon - 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.

To get started, click the Security button on the main toolbar, then select Abuse Detection from the Security folder tree view.

Once you arrive on the Abuse Detection screen, you will see three icons on the actions toolbar— New , Edit , and Delete .

When clicking the New icon on the actions toolbar you will have these options:

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 relatively 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.

Edit Icon - Editing and item can be done three ways:

• Select the item and then choose the Edit icon from the actions toolbar, or

• Right-click the item and choose Edit from the drop down list, or

• Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

• Select the item and click the Delete icon from the actions toolbar, or

• Right-click the time and select Delete from the drop down list

Greylisting

What is Greylisting and how does it work?

Greylisting is a new tool in the fight against spam. It will temporarily block incoming mail from a sender and then returns the mail to the sender's mail server with a message saying effectively, "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 would 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, click the Security button on the main toolbar, then select Greylisting from the Email Protection folder tree view.

> • Block Period - The period of time (in minutes) that mail will not be accepted (default 15 minutes).
> • Pass Period - The period of time (in minutes) in which the sender's mail server has to retry sending the message (default 360 minutes).
> • Record Expiration - The period of time(in days) that the sender will remain immune from greylisting once it has passed (default 36 days).
> • Enable Greylisting - If this is enabled it will allow Greylisting to happen.
> • Enable Users to Override Greylisting - Enable this to allow users to selectively turn off Greylisting (useful if you have an account that receives time sensitive mail).
> • Enable Greylisting to SmartHosts - If this feature is enabled, it will determine whether or not SmartHosts are governed by Greylisting. This is determined by evaluating the MX record of the recipient's address and matching it against the IP address of any target server IP address configured in the SmartHost settings area. For more information, see the SmarterHosts section of the online help. System administrators should note that the following cases are exempt from Greylisting:

> • Whitelisted IPs for SMTP or Greylisting
> • Anyone who authenticates (includes SMTP Auth Bypass list)
> • Trusted senders
> • Anyone who has already sent you an email
> • Any IP in the greylistBypass.xml file

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 verify a new user's identity by sending them a confirmation email.

Some e-mail servers will not attempt to re-deliver email 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 by clicking the Security button on the main toolbar, then selecting SpamAssassin Servers from the Email Protection folder tree view. The Windows Version of SpamAssassin is limited to about 40,000 messages per day, if you anticipate more than this, then please read our Anti-Spam Administration page from the Security folder in the Systems Administration section of the help files.

SMTP Blocked Senders

The SMTP Blocked Sender list is an effective method for temporarily canceling a domain or indiviual 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.

To get started, click on the Security button on the main toolbar, then select SMTP Blocked Senders from the Security folder tree view.

Blocked Senders - Enter the email addresses or domain names you want to block, one per line. The asterisk (*) wildcard symbol 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 be very beneficial 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.

To get started, click the Security button on the main toolbar, then select SMTP Authentication Bypass from the Security folder tree view.

New Icon - Click on this button to add additional IP addresses to the bypass. More information can be found below.

Edit Icon - Editing and item can be done three ways:

- • Select the item and then choose the Edit icon from the actions toolbar, or
- • Right-click the item and choose Edit from the drop down list, or
- • Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

- • Select the item and click the Delete icon from the actions toolbar, or
- • Right-click the time and select Delete from the drop down list

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

This page is available in Enterprise Edition only

SmarterMail allows System Administrators to add Secure Socket Layer (SSL) and Transport Layer Security (TLS) rules.

To get started click the Security button on the main toolbar, then select SSL from the Security folder tree view.

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 connnection 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.

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

Edit Icon - Editing and item can be done three ways:

> • Select the item and then choose the Edit icon from the actions toolbar, or
> • Right-click the item and choose Edit from the drop down list, or
> • Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

> • Select the item and click the Delete icon from the actions toolbar, or
> • Right-click the time and select Delete from the drop down list

Password Requirements

Minimum Password Length - This will allow System Administrators to designate the minimum numbers of characters a password requires.

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: Number, Capital Letter, Lower Case Letter, Symbol, Not User Name.

Additional Topics

Automating LogIn to SmarterMail

The HTML code below demonstrates how you can make a text link (e.g. "Log into your mail") that automatically logs a user 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". With the default installation, you would use http://127.0.0.1:9998/Services/svcServerAdmin.asmx.

To get a brief explanation of the web services available to you, along with the default installation paths to the specific web services details page, download the Automation with Web Services document.

Gateways and Other Server Roles

Please note that SmarterMail was designed to support one server in several of these roles. For instance, one server could act as an Incoming Gateway, Outgoing Gateway, or Backup MX.

SmarterMail can also take on one of these roles when placed together with a competing mail server product. For example, using SmarterMail as an outgoing gateway on a server other than your primary mail server may help to resolve problems with stability of other mail server software products.

Primary mail server

• Use for storing email for defined users.

• Accessible through POP, SMTP, IMAP, and over the web.

• To configure:

• Follow instructions in online help

Backup MX Server

• Use as a backup for mail delivery in case of short amounts of downtime or delivery problems on your primary mail server.

• To configure:

• Add a placeholder domain (called "example.com") to open up the port to listen on.

• Configure SmartHosting by adding the IP addresses to which delivery should be allowed.

• In general settings, change the delivery retry times to 10, 10, 10, and 1440.

• In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

Incoming Gateway server

The FREE, one-domain version will suffice for virtually all environments.

• Use to host third party anti-virus and/or anti-spam software products in order to reduce load on primary server.

• Reduces load on primary server by managing all incoming sessions and performing abuse/intrusion detection.

• To configure:

• Enable domain forwarding and add all destination IPs and domain names that will be forwarded.

• Add a placeholder domain (called "example.com") to open up the port to listen on.

• In DNS, change the MX records of your domains to reference the new gateway server.

• Install and configure any third-party anti-virus or anti-spam products, such as Declude JunkMail or Declude Virus.

Outgoing Gateway server

The FREE, one-domain version will suffice for virtually all environments.

• Use as a delivery mechanism to reduce load on your primary servers.

• Also use as a method to combat blacklisting. If the server gets blacklisted, rotate the primary

IP on the network card to a different one to send out on the new IP.

• To configure:

• Add a placeholder domain (called "example.com") to open up the port to listen on.

• Set relay option in General Settings to "nobody".

• Add the primary mail server's IP addresses to the IP Whitelist for SMTP.

• In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

SmartGateway server

The FREE, one-domain version will suffice for virtually all environments.

• Use as a delivery mechanism to balance the load on your gateway servers.

• To configure:

• Add a placeholder domain (called "example.com") to open up the port to listen on.

• Set relay option in General Settings to "nobody".

• Add the primary mail server's IP addresses to the IP Whitelist for SMTP.

• In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

Backup MX Servers

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

• Hardware or software failure

• Very busy and unable to receive new incoming connections, or emails

• Network connection is down or saturated

• Network routing issues can also cause your mail server to become unavailable

Case 1 - No Backup MX

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

• Email will be bounced (Returned to Sender).

• Your (inbound) email will cause a backup in the originating mail server's spool.

• Service Timeout. Depending on the Retry attempts by the originating mail server, your mailboxes may never receive their incoming email.

• Users do not understand bounce messages. To most users, bounce messages are unreadable, so when they can't send an email, they do not try to resend.

Case 2 - With a Backup MX

How Email works when a Backup MX Server is involved:

- User sends an email to 'user@example.com' (a mailbox hosted by your SmarterMail Server)
- Their mail server looks up the MX Records for 'example.com' and finds two:

- IP: x.x.x.x Weight: 10
- IP: y.y.y.y Weight: 20
- Their mail server first attempts to connect to: x.x.x.x
- Connection fails, which could be caused by any of the above conditions
- They try to connect to the secondary MX record: y.y.y.y
- They successfully connect to this server.
- Email transmission begins, and the Backup MX Server receives the email into its spool.
- Since there are no existing local domains on this server, SmarterMail stores this email in its spool.
- Based off of the Retry Attempts, SmarterMail will continue to try and make connections to your Primary Mail Server.

- SmarterMail will only make 4 retry attempts. It is recommended that you set the last attempt to a longer timeframe, i.e., 24 hours (1440 minutes)
- This way SmarterMail does not send a Bounce Message to the originator saying that it could not deliver the message, before your Primary Server is back online.
- If your Primary Mail Server comes back online before the final Retry Attempt, you can reset the Retry Counts on all messages in the spool. This will force the Backup MX Server to try forwarding all existing mail in the spool back to your Primary Mail Server.

Configuring a Backup MX Server

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

Locking Down Your Server

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

What is Security for a Mail Server?

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

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

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

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

Update SmarterMail Regularly

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

To receive notifications of every update that SmarterTools releases for SmarterMail, go to the SmarterTools Customer Portal , login, select Account Management, then select Mailing Lists, and choose the "Updates.SmarterMail" subscription. 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. When catch-alls were most popular, spamming methods were not as sophisticated, and email harvesting attacks were not so prevalent.

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

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

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

- Alert your users that catch-alls are being disabled.
- Go to the General Settings page under the Settings menu.
- Click on the Security tab.
- Change Catch-Alls to Disabled.
- Click on Save icon.

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 icon.

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 icon.

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 dependent 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. When installing SmarterMail for the first time, you will be required to change this password during the setup wizard. Here are instructions in the manner you would want to change the system administrator password again.

Instructions

- Log in as the administrator with the current login.
- Click the Settings icon.
- Choose General Settings in the left tree view.
- 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 icon.

Resetting an Unknown Login

For instructions on how to reset an administrator login when the current login is unknown, please see the KB article on Resetting an Administrator Login .

Reporting

Reports Overview

Summary Reports display summarized data at the system, domain, and user level within a user defined block of time. Summary Reports are especially useful for determining the overall usage and performance of systems, domains, and users relative to each other.

Trend Reports display data points—connected by trend lines—for a system, domain, or user over a selected time span. Trend Reports are especially useful for determining the usages and performance month-by month, day-by-day, and hour-by-hour (etc.).

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

Report Options

You will see a calendar of the current month and five fields with drop down menus on the right side.

NOTE: Not all of the options below will be available for each report type.

Calendar - You can choose any amount of time you wish to base your report on—day, week, or month.

Rows - You can choose how many rows of usernames you would to have appear—10, 100, 500, 1000, 10,000

Sort - This allows you to choose how you want the different usernames sorted. Then you can select if you want it sorted in Ascending or Descending order.

Chart - This allows you to select which type of graph you want your data displayed in.

Value 1 - This gives you the option of which values you want to use in your graph—None, Total Disk, Junk Email, Deleted Items.

Value 2 - You can choose if you would like to add a second value to your graph.

Group - You can choose how you want the data displayed—Hourly, By Hour of Day, Daily, By Day of Week, Weekly, Monthly, By Month of Year, or Quarterly.

Once you have the data which you want shown in the report, click the Get Report button on the right side.

Across the action toolbar there are four icons—Add Favorite, Email, Export, and Print.

Add Favorite - This will allow you to add this report to your favorites list.

Email - This will allow you to send another person your report.

Export - This will allow you to export your report to a file.

Print - This will allow you to print your graph and chart.

Favorites

Report Favorites gives a user the ability to define certain criteria for reports that they will run on a regular basis. Once a chart is located that you would like to save, click the Add Favorites icon from the actions tool.

After clicking the Add Favorites icon, a window will pop up asking you to name your saved report and to populate the chart fields. Chart Definitions Once all fields are completed to your satisfaction, click OK at the bottom of the pop up window.

To access one of your Favorites at anytime, click the report from under the Favorites in the left tree view.

Email Reports

SmarterMail gives you the opportunity to email yourself or others a specific report with any frequency (Daily, Weekly, Monthly) you choose. To get get started, click Scheduled Email Reports from the left tree view.

After clicking Scheduled Email Reports , click the New icon on the actions toolbar and you will be asked to populate the following fields:

Name - From the drop down list, choose the custom report you would like regularly emailed to you and/or others.

Frequency - From the drop down list, choose how often you would like the report emailed to you. (Daily, Weekly, Monthly)

To Address(es) - Enter the email addresses you would like the report sent to.

Cc Addresses(es) - Enter any additional email addresses that you would like to have receive a carbon copy.

Subject - Enter the subject for this email.

Message - Enter the message you would like associated with the email.

Email Format - From the drop down list, choose what format you would like the email sent (HTML + Plain text or Plain text only).

Enable Charts - Enable this to have charts associated with your report.

Custom Reports

The use of custom reports allows a user to accumulate data using very specific parameters. For example, a CEO of an organization may want to group related report items into one report to get an executive report of all their managers. To get started, click the Reports button on the main toolbar, then select Add Custom Report from the Custom Reports folder tree view.

Once you click on add custom report, you will be asked two things:

- Custom Report Name
- Default Date Range

Once you complete those two fields, click the Next icon from the actions toolbar.

Report Items

You will see four icons on the actions toolbar in this tab—Save, Add Item, Edit, and Delete.

Save - Clicking this icon will allow you to save your custom report as you go along.

Add Item - This allows you to add what parameters you would like your report to follow.

Report Item - Choose the report you would like to use from the drop down list.

Delete - This icon will let you delete a custom report.

Summary Reports

Traffic Reports

Disk Usage

This report will tell you the amount of disk space currently being used by all domains on your server.

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

Message Traffic

This report will tell you the number of messages that are being sent and received by all domains on your server.

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

Message Data

This report tells you the amount of data which was sent and received in KB by all users within in your domain.

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

SMTP In Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP incoming mail for all domains on your server.

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

SMTP In Errors

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

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

SMTP Out Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP outgoing mail from all domains on your server.

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

SMTP Out Errors

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

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

POP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from POP incoming mail for all domains on your server.

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

POP Errors

This report tells if any errors occurred from POP incoming mail for all domains on your server.

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

IMAP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from IMAP incoming mail for all domains on your server.

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

IMAP Errors

This report tells if any errors occurred from IMAP incoming mail for all domains on your server.

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

Trusted Senders

This report tells you the number of messages that you have received from Email addresses which are listed in the trusted senders in the Settings page for all domains on your server.

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

Spam and Virus Reports

Incoming Spam

This report tells you the number of Spam Messages which were received at different tolerance levels for all domains on your server.

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

Outgoing Spam

This report tells you the number of outgoing messages that were blocked due to spam for all domains on your server.

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

Greylisting

This report tells you the number of connections which were allowed and delayed due to Greylisting for all domains on your server.

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

Viruses

This report tells you the number of viruses which were received through email for all domains on your server.

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

Trend Reports

Traffic Reports

Server Status

This report will tell you the amount of memory currently being used on your server.

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

Message Traffic

This report will tell you the number of messages that are being sent and received on your server.

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

Message Data

This report tells you the amount of data which was sent and received in KB on your server.

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

SMTP In Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP incoming mail for all domains on your server.

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

SMTP In Errors

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

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

SMTP Out Usage

This report tells you the size of the bandwidth and the number of connections that have been made from SMTP outgoing mail from all domains on your server.

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

SMTP Out Errors

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

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

POP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from POP incoming mail for all domains on your server.

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

POP Errors

This report tells if any errors occurred from POP incoming mail for all domains on your server.

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

IMAP Usage

This report tells you the size of the bandwidth and the number of connections that have been made from IMAP incoming mail for all domains on your server.

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

IMAP Errors

This report tells if any errors occurred from IMAP incoming mail for all domains on your server.

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

SMTP Out Connections

This report tells you the number of SMTP Out connections your server has made.

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

SpamAssassin Connections

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

ClamAV

This report tells you the number of connections your server has made.

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

Spam and Virus Reports

Incoming Spam Counts

This report tells you the number of Spam Messages which were received at different tolerance levels on your server.

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

Outgoing Spam Counts

This report tells you the number of outgoing messages that were blocked due to spam on your server.

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

Incoming Spam Percentages

This report tells you the percentages of Spam Messages which were received at different tolerance levels on your server.

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

Outgoing Spam Percentages

This report tells you the number of outgoing messages that were blocked due to spam on your server.

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

Greylisting

This report tells you the number of connections which were allowed and delayed due to Greylisting for all domains on your server.

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

Viruses

This report tells you the number of viruses which were received through email for all domains on your server.

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

The report is broken up into two columns—Day and Viruses.

Events

Overview

The Events system allows you to act on Events that occur throughout the system. SmarterMail's Event System is intended to allow an infinite number of unique customizations using notification profiles and the reminders system.

It is recommended that you create/update your Notification Profile prior to creating an Event.

Manage Events

The All Events page lists all of your scheduled events and lets you perform many actions, including: editing, deleting, searching, or adding a new event.

View your Events by clicking on All Events under My Events from the tree view in the sidebar.

Adding an Event - To add a new event, either select Attach Event from the tree view, or click the New icon from the actions toolbar.

Edit an Event - Editing an event can be done in three different ways:

> • Select the event that you would like to edit and then click the Edit icon from the actions toolbar, or
> • Move your mouse over the event you want to edit and right-click, then select Edit from the drop down menu, or
> • Double-click the event that you would like to edit

Deleting an Event - Deleting an event can be done two different ways:

> • Select the event that you would like to delete and then click the Delete icon from the actions toolbar, or
> • Move your mouse over the event you want to delete and right-click, then select Delete from the drop down menu.

Searching an Event - To search your events, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions tool bar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, Event Category, Event Type, Conditions, or Actions.

Create a New Event

To add a new event, select New Event from the left tree view.

The event page is split into two tabs for easy use—Options and Actions.

Options Tab

Name - Allows you to assign a specific name to your event.

Event Group - Allows you to select a folder in which to store/associate your event subscriptions.

- To add a new Event Group, click the Plus Sign iconon the folders toolbar.
- To edit an Event Group, select the Event Group you wish to Edit and then click the Pencil icon on the folders toolbar.

Event Category - Select the trigger category for your notification. For more information about specific event categories, selecta category for the Event Categories folder.

Event Type - This is a specific trigger relating to the Event Category.

Based upon the Event Category and Event Type that was chosen, different parameters will be availalbe for you to choose to help set up your event.

Actions Tab

When clicking the Actions tab the screen will be blank. To add a new event, click the Add Action icon from the actions toolbar.

Action - This defines how the system will alert you.

Max Frequency - This allows you to set how often you want to be notified.

Notifictaion Profile - This allows you to choose which profile you want to use.

From Address - This is the email address from which the email will be sent from.

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

Once all fields are complete, click the Save icon from the actions toolbar to save that event.

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

The Notification Profiles page lists all of your profiles and lets you perform many actions, like adding a new profile, edit, delete, or search.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

Event Categories

Aliases

Alias Added

Users of SmarterMail can sent up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has added a new alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

Alias Deleted

Users of SmarterMail can sent up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has deleted an existing alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

Collaboration

Calendar Reminder Occured

SmarterMail gives users the ability to set up reminders to alert them of upcoming appointments within their calendar. Users of SmarterMail can utilize the attributes listed below to alert them of when a reminder has occured.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Location - Enter a meeting location to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

Task Reminder Occurred

SmarterMail gives users the ability to set up reminders to alert them of upcoming deadlines for particular tasks. Users of SmarterMail can utilize the attributes listed below to alert them when a reminder for a task has occurred.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Priority - Enter the priority level to trigger this event.

Percent Complete - Enter the percent complete of a task to trigger this event.

Status - Enter the status of a task to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

Domain

Domain Added

Administrators may want to monitor when domains have been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new domain has been added to the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used - Enter the number of domains that will trigger this event.

Domains User (%) - a percentage of the total number of domains allowed to trigger this event.

Domain Deleted

Administrators may want to monitor when a domain has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a domain has been deleted from the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used -

Domains User (%) -

Domain Disk Space Used

The amount of disk space a domain uses is very important for administrators to monitor. Administrators can utilize the attributes listed below to be notified when a domain reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain Usage (%) - Enter the percentage of disk space used to trigger this event.

Domain Usage (MB) - Enter the disk space used in MB to trigger this event.

Domain - Enter a domain to trigger this event.

Email

Email Message Received

Users can utilize the attributes listed below to be notified when they recieve a message within SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is received from within the domain.

Spam Level - Select the spam level you want to have trigger this event.

Email Message Sent

Users can utilize the attributes listed below to be notified when a message is sent from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is sent within the domain.

Mailing Lists

Mailing List Added

Mailing lists can be very time consuming and can slow down the efficiency of a server when being sent. Administrators can utilize the attributes listed below to alert them when a new mailing list has been added to the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

Mailing List Deleted

Administrators can utilize the attributes listed below to alert them when a mailing list has been deleted from the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

Message Sent to Mailing List

Administrators can utilize the attributes listed below to be notified when a message has been sent to a mailing list.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

Security

Abuse Detection Rule Triggered

The monitoring of Security for an administrators system and/or domain is very important. Administrators would and need to know if a domain or user has abused any rule that has been put in place. Administrators can utilize the attributes listed below to be notified when a rule has been abused.

Attributes

Time of Day - Enter a time of day to trigger this event.

Rule Type - Select the security rule that you want to trigger this event.

IP Address - Enter an IP address that will trigger this event.

Rule Name - Enter a name for the rule to trigger this event.

ClamAV Failure

ClamAV is a 3rd party source integrated with SmarterMail to help detect and prevent viruses from entering the system. Administrators can utilize the attributes listed below to notify them when there has been a failure with the ClamAV service.

Attributes

Time of Day - Enter a time of day to trigger this event.

ClamAV IP - Enter the IP address of the ClamAV server that will trigger this event.

ClamAV Port - Enter the port of the ClamAV server that will trigger this event.

Consecutive Failures - Enter the number of failures that needs to be reached to trigger this event.

File Name - Enter the name of the file to trigger this event.

File Size (KB) - Enter the size of the file in KB that will trigger this event.

Outgoing Message Blocked

Administrators may want to know if outgoing messages are being blocked so they can further investigate why and from whom the message was sent. Administrators can utilize the attributes listed below to be notified when an outgoing message was blocked.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Spam Weight - Enter the spam weight of the message that will trigger this event.

File Name - Enter the name of the file to trigger this event.

SpamAssassin Failure

SpamAssassin is a 3rd party source integrated with SmarterMail to help detect and prevent spam from entering the system. Administrators can utilize the attributes listed below to notify them when there has been a failure with the SpamAssassin service.

Attributes

Time of Day - Enter a time of day to trigger this event.

SpamAssassin IP - Enter the IP address for the SpamAssassin server that will trigger this event.

SpamAssassin Port - Enter the port for the SpamAssassin server that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

Consecutive Failures - Enter the number of failures that needs to be reached to trigger this event.

File Name - Enter the name of the file to trigger this event.

File Size (KB) - Enter the size of the file in KB that will trigger this event.

Virus Found

Viruses can be very harmful to SmarterMail or the entire system. Administrators can utilize the attributes listed below and be notified if a virus gets through the ClamAV service and is found.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Virus Name - Enter the name of a virus that will trigger this event.

File Name - Enter the name of the file to trigger this event.

System

Gateway Failure

Administrators can utilize the attributes listed below to be notified when a gateway server has failed so they can correct the problem as soon as possible.

Attributes

Time of Day - Enter a time of day to trigger this event.

Gateway Address - Enter the address of the gateway that will trigger this event.

License Expiration

Administrators may be using a trial license to experiment with a new product and will want to know when it expires. Administrators can utilize the attributes listed below to be notified when the license is close to expiration.

Attributes

Time of Day - Enter a time of day to trigger this event.

Days Left - Enter the number of remaining days that will trigger this event.

Memory

Memory is very important for a mail server to maintain the best effcency possible and domains and uses may be set at a certain maximum. Administrators can utilize the attributes listed below to be notified when the domain or user reaches a certain memory level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Memory Used (%) - Enter the percentage of memory used that will trigger this event.

Memory Used (MB) - Enter the amount of memory used in MB that will trigger this event.

New Version Available

Administrators can utilize the attributes listed below to be notified when a new version has been made available.

Attributes

Time of Day - Enter a time of day to trigger this event.

Version - Enter version that will trigger this event.

Service Started

Administrators may want to know if and when a new service has been started. Administrators can utilize the attributes listed below to be notified when a new service has been started.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

Service Stopped

Administrators may want to know when a service has been stopped. Administrators can utilize the attributes listed below to be notified when a service has been stopped.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

Spool Count

The number of messages within the spool can be very important when the number reaches a certain level which could mean a problem within the system. Administrators can utilize the attributes listed below to be notified when the spool count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Spool Count - Enter the number of messages in the spool that will trigger this event.

System Settings Changed

Administrators can utilize the attributes listed below to be notified when any settings have been changed within the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

System Uptime

Administrators may want to monitor the total amount of time the system has been running and can utilize the attributes listed below to notify them when it reaches a certain point.

Attributes

Time of Day - Enter a time of day to trigger this event.

Uptime (Days) - Enter the number of days the system has been running that will trigger this event.

Threads

Administrators will want to monitor concurrently running threads to ensure the system to be running at the maximum efficiency. Administrators can utilizes the attributes listed below to be notified when the thread count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Thread Count - Enter the number of threads that will trigger this event.

Throttling

Domain Throttled

Administrators can put a throttling theshold on a particular domain within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a domain reaches the throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

User Throttled

Administrators can put a throttling theshold on a particular user within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a user reaches that throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

User

User Added

Administrators may want to monitor when a new user has been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new user has been added to SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

User Deleted

Administrators may want to monitor when a user has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a user has been deleted from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

User Disk Space Used

The amount of disk space a user utilizes is very important for administrators to monitor, because domains may only be given a certain amount of disk space to use. Administrators and users can utilize the attributes listed below to be notified when a particular user reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Mailbox Usage (%) - Enter the percentage of the mailbox used that will trigger this event.

Mailbox Usage (MB) - Enter the size in MB of the mailbox used that will trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

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. The minimal requirements are as follows:

- 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

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.
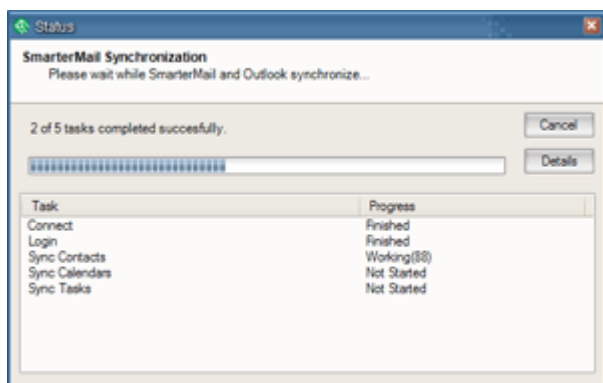
Terms Used

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

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	

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

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

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.

SyncML

SmarterMail is a powerful collaboration mail server that supports synchronization of calendars, tasks, notes, and contacts on desktop applications like Microsoft Outlook as well as over-the-air synchronization for the most popular mobile devices, such as BlackBerry, Windows Mobile Devices, and the iPhone.

In an effort to reduce confusion, a white paper has been written to provide a breakdown of the different methods users can accomplish synchronization with each unique device. This document can be found on the Help and Documentation page by clicking "Collaboration, Synchronization, and Over-the-Air Mobile Communications with SmarterMail" once you arrive on that page.

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 supports 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	

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

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 within the SmarterMail interface. To access the download click on the Settings icon in the main toolbar and select SmarterMail Client Utilities in the left tree view.

	Download and install SmarterMail Sync.

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.

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).

Release Notes

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

Version 2.0.2798

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

Glossary

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

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This EULA is effective as of the Effective Date. You may terminate this EULA by completely deleting and wholly destroying any copies of the Software and documentation in Your possession or control. SmarterTools may terminate the License and/or EULA if, in its sole discretion, SmarterTools determines that You have breached any of the terms and conditions of this EULA, with or without notice to You of such termination.

Sections 1.B., 1.C., 1.D., 3, 5, 6, 7, 8, 9, 10, 11, and 12 shall survive termination of this EULA.

3. Limited Warranty and Limitation of Liability.

A. No Warranties.

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B. No Liability for Damages.

SmarterTools shall not be liable for any damages under this EULA, including but not limited to consequential, statutory, punitive, incidental, or indirect damages, including but not limited to any loss of data, loss of profits, loss of savings, loss of time or convenience, or additional cost arising out of the

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C. Third Party Providers and Web Services.

The Software is designed to integrate and/or to be used in conjunction with Third Party Providers through Web services. SmarterTools assumes no liability and makes no warranty or guarantee regarding the applicability of effectiveness of this Software when used in conjunction with these products or whether or not such integration or use might interfere with the operation therein. You agree to hold SmarterTools harmless in all matters resulting from the integration or use with Third Party Providers.

D. Limitation of Liability.

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

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* 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;

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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.

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