



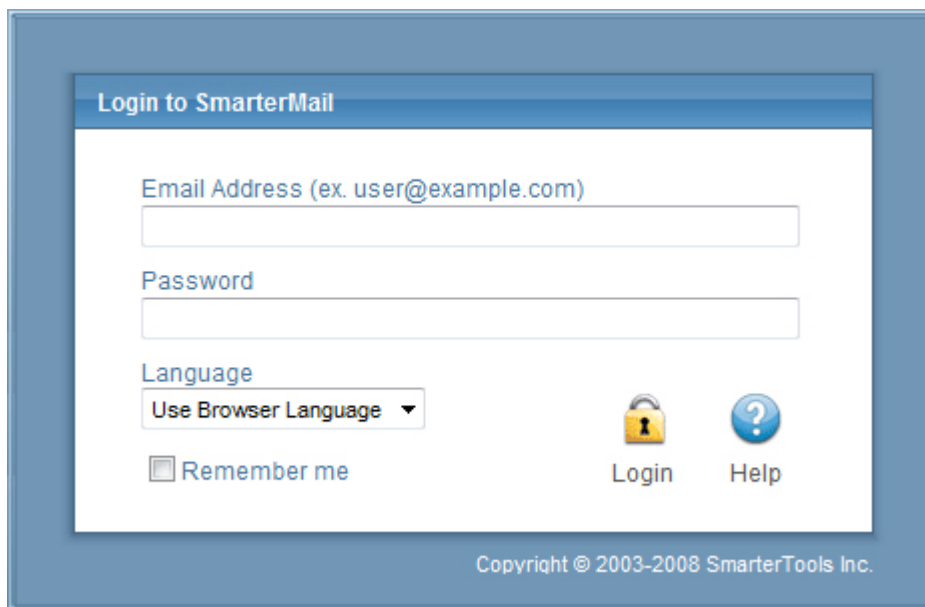
Help for Email Users

Help Documentation

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.



The screenshot shows the SmarterMail login interface. It features a blue header bar with the text "Login to SmarterMail". Below the header, there are three input fields: "Email Address (ex. user@example.com)", "Password", and "Language". The "Language" field is a dropdown menu currently set to "Use Browser Language". Below the "Language" field is a checkbox labeled "Remember me". To the right of the "Remember me" checkbox are two buttons: "Login" with a padlock icon and "Help" with a question mark icon. At the bottom of the form, there is a copyright notice: "Copyright © 2003-2008 SmarterTools Inc."

To login to SmarterMail, type in your full email address and password on the login screen. If everything matches up, you will be presented with the welcome page and a view of all folders in your mailbox. Alias names cannot be used to log in.

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

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

Welcome to SmarterMail

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

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

My Today Page

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

Calendar - lists upcoming events on your calendar.

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

Inbox - lists how many unread messages you have.

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

Tasks - lists unfinished tasks.

The My Today page is the default page to load when logging into your account. If you would rather go straight to your Inbox you can change it by 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 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 will 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™ (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

Calendar Overview

Calendar 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.

- Previ 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.

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

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 tool 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.