



Settings

Help Documentation

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 Menu 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.