



# Filtering

Help Documentation

## **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-someheadertype: 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 antispam measures that will help keep your inbox free of unwanted mail. Your domain administrator has probably already set up some basic spam filtering options.

To view your spam filtering settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the My Settings and Filtering folders and click Spam Filtering in the left 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.