



# 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 icons: a yellow padlock icon labeled "Login" and a blue question mark icon labeled "Help". 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.

When you log in, your inbox or the My Today Page will display in the content pane. To view the contents of another folder, click on the appropriate folder in the left tree view.

### Working with Email in Your Inbox

To view the contents of a message, click the desired message and it will load in the preview pane. You can also double-click the message to view it in a pop-up window.

To sort messages, click on the appropriate column header to sort messages in descending or ascending order by that column. For example, clicking the Size column header will sort items in order of size. Click the header again and the sort will go in the opposite direction.

In general, the following columns are available in the content pane:

- **Checkbox** - Use these boxes to select multiple messages. Messages must be selected before choosing an action from the actions toolbar.
- **Status Indicator** - 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; and the envelope with a red arrow indicates a forward.
- **Date** - The date and/or time the mail system received the email.
- **Size** - The size of the email in kilobytes.
- **Attachment Icon** - If the message has an attachment(s), a paperclip icon will display next to the message size.

## 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

In general, the following options are available in the actions toolbar:

- **Mark** - Allows you to mark the selected message(s) as read, unread, spam, or not spam.
- **Read** - Marks the selected message(s) as read and changes the status indicator appropriately.
- **Unread** - Marks the selected message(s) as unread and changes the status indicator appropriately.
- **Spam** - Marks the selected message(s) 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, in which 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 your mail server avoid that type of mail in the future. Note: If you are using the Commtouch Premium Antispam add-on, messages marked as spam will be sent to Commtouch for evaluation.
- **Not Spam** - Marks the selected message(s) as not spam and automatically adds the email

address to your trusted senders list.

- Move - Allows you to move the selected message(s) to any available inbox folder. Note: You can also drag-and-drop messages to an available folder.
- Delete - Allows you to delete, undelete, purge deleted messages, or delete all messages in a folder.
- Delete - Deletes the selected message(s). The action taken when a message is deleted is dependant upon the option chosen in Settings. For more information, please see [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. Note: 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 - Allows you to search for a specific message. For more information, please see [Search Messages](#) .

Note: Depending on the folder you are viewing and the settings you have on your account, some of these options may not be available.

## Create a New Message

There are several ways to compose a new message in SmarterMail. The most common method is to click New Message in the left tree view. This will open a new message window and the following options will be available in the actions toolbar:

- Send - Sends your message to the designated 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 message and closes the new message window.

## Compose

Use this tab to specify the recipients, message subject, and to write the email message.

- To - Type the email addresses to which the message will be sent. Separate multiple contacts with a semicolon (;). Note: Click To to select email addresses from your address book.

SmarterMail Enterprise users can change the list source to select email addresses from the Global Address List.

- Cc - Type the email addresses of recipients that should receive a carbon copy of the message.
- Bcc - Type the email addresses of recipients that should receive a blind carbon copy of the message. Note: Emails listed in this field will be concealed from the complete list of recipients. For this reason, it is common practice to use the Bcc: field when addressing a very long list of recipients or a list of recipients that should not (necessarily) know each other.
- Subject - The subject of the email.

Note: When entering addresses into the To, Cc, and Bcc fields, SmarterMail will auto-complete addresses by referencing your contacts list or the Global Address List.

## Attachments

Use this tab to add attachments to the email. Note: You must click Upload to attach the file. It is also important to remember that many email systems limit attachment size.

## Options

Use this tab to specify the importance of the message or to request a read receipt. By default, messages have a normal level of importance.

**Preview Use this tab to preview the message in HTML format.**

## Reading a Message

To view the contents of a message, click the desired message and it will load in the preview pane. You can also double-click the message to view it in a pop-up window.

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.

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.

Attachments link - Displays links to download any attachments as individual files as a zip file that contains all attached items. Be very careful when opening attachments in emails. Ensure that you know the sender and do not open any attachments you are not expecting.

## 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.

## [Collaborate](#)

### [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, refer to the KB article [How To - Export SmarterMail Contacts](#) .

**Import Contacts** - For information about importing contacts, refer to the KB article [How To - Import Contacts to SmarterMail](#) .

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 see [Synchronization Overview](#) .

## 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

## Global Address List

This feature is only available in SmarterMail Enterprise.

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, such as support@example.com.

Contact information for the Global Address List is pulled from individual profiles of users. To update your listing, click the Settings button in the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and click Account Profile in the left tree view.

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

The Global Address List functions almost identically as My Contacts.

## 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.

- **Prev and Next** - Click these buttons to quickly select the next month, week, or day (depending on your current view mode).
- **Editing an Appointment** - Click on an appointment to edit its content.
- **Deleting an Appointment** - To delete an appointment, click on it, then click on the Delete

button.

- **Sharing (Enterprise Edition Only)** - Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share your calendar with another user on your domain.

## Create a New Appointment

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

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

For information about inviting attendees, please refer to the help topic [Inviting Attendees](#) .

## Appointment

The Appointment tab records the common information about the appointment. The available settings are explained below.

- **Subject** - This is the short description of the appointment, and is what will appear on calendar pages and reminders.
- **Attendees** - Enter the email addresses of the people who you want to have attend this event. You can click on the attendees link to pop up a window that lets you quickly add members of your contact list or Global Address List. You can also check your attendees' availability by clicking on the Availability link to the right of the box. (Enterprise Edition Only). Once you save your appointment, the attendees will receive an email invitation to the event. If they accept, you will receive a notification back. Additionally, if they accept from within SmarterMail, the event will get added to their calendar as an appointment.
- **Location** - The physical location of the appointment. This field is optional.
- **Start Date and Time** - Enter the start date of the event. If the event will go all day, check the "All Day Event" box. You may click the calendar and/or the clock to the right of the box to help with this.
- **End Date and Time** - If the appointment does not have a scheduled end time, you may leave the end time blank.
- **Reminder** - This will allow you to choose if you want to be notified with an email, and at what time before the event starts. For more information about reminders, please see the help topic

Reminders .

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

Note: Appointments will span multiple days and times if needed.

## Recurrence Information

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

## Description

Enter the full description of the appointment, if needed.

## Categories

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

## Recurring events

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

- Personal Occasions (Birthdays, Anniversaries)
- Holidays
- Regular Meetings/Business Appointments
- Important Reminders (Seasonal Appointments)
- Much More

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

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

## Reminders

Reminders may be added to appointments in calendaring by setting the reminder drop-down box to a value other than None in the Appointments tab when making a New Appointment. When a reminder is



activated, a popup window will appear that reminds you of the event. At the bottom of the popup window you have the following options  Snooze, Dismiss All, Dismiss, and Close the Window.

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

## **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
- 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.

## 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
- 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.

## [Workspace](#)

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

## Reports

### Reports Overview

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

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

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

## Report Options

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

## Favorites

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

After clicking the Add Favorites icon, a window will pop up asking you to name your saved report and

to populate the chart fields. Chart Definitions Once all fields are completed to your satisfaction, click OK at the bottom of the pop up window.

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

## Email Reports

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

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

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

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

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

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

Subject - Enter the subject for this email.

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

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

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

## Custom Reports

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

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



- Custom Report Name
- Default Date Range

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

## **Report Items**

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

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

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

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

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

## **Summary Reports**

### **Traffic Reports**

#### **Disk Usage**

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

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

#### **Message Traffic**

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

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

#### **Message Data**

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

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

## Throttle Traffic

This report shows the number of messages that have been throttled on your server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## Throttle Violations

This report shows the number of throttle violations on your server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## SMTP In Usage

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

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

## SMTP In Errors

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

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

## SMTP Out Usage

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

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

## **SMTP Out Errors**

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

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

## **POP Usage**

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

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

## **POP Errors**

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

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

## **IMAP Usage**

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

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

## **IMAP Errors**

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

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

## Trusted Senders

This report shows the number of messages received from email addresses listed as trusted senders for all domains on your server.

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

## Spam and Virus Reports

### Incoming Spam

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

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

### Outgoing Spam

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

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

### Greylisting

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

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

### Viruses

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

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

## **Trend Reports**

## **Traffic Reports**

### **Server Status**

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

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

### **Message Traffic**

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

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

### **Message Data**

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

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

### **Throttle Traffic**

This report shows the number of messages that have been throttled on your server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

### **Throttle Violations**

This report shows the number of throttle violations on your server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Bounces Received - The number of bounced messages throttled.
- Messages Sent - The number of sent messages throttled.
- SMTP Out Bandwidth - The amount of bandwidth throttled.

## Traffic By Priority

This report shows how many messages going through the spool were assigned priority levels. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

## Bandwidth By Priority

This report shows the bandwidth for all messages in each priority level. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

## SMTP In Usage

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

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

## SMTP In Errors

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

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

## SMTP Out Usage

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

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

## SMTP Out Errors

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

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

## POP Usage

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

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

## POP Errors

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

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

## IMAP Usage

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

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

## IMAP Errors

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

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

## IMAP Errors

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

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

## SpamAssassin Servers

This report shows general data regarding connections to external SpamAssassin servers. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Avg. Active Connections - This is the average number of active connections made by SmarterMail.
- Connections - This is the total number of connections made to a SpamAssassin server.
- Failed Connections - The total number of failed connections to a SpamAssassin server.

## SMTP Out Connections

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

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

## ClamAV

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

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

## Spam and Virus Reports

### Incoming Spam Counts

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

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

### Outgoing Spam Counts

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



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

## Incoming Spam Percentages

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

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

## Outgoing Spam Percentages

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

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

## Greylisting

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

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

## Viruses

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

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

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

## Security Reports

### Abuse Detection

This report shows the number of attacks on the server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- DOS Violations - The total number of DOS violations.
- Harvesting Violations - The total number of harvesting violations.
- Internal Spammer Violations - The total number of spam violations from users on the SmarterMail server.

## **Blacklist / Whitelist**

This report shows the number of connections made from blacklisted and whitelisted IPs. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Blacklisted Connections - The number of connections SmarterMail made to blacklisted IPs.
- Whitelisted Connections - The number of connections SmarterMail made to whitelisted IPs.

## **Settings**

### **My Settings**

#### **Account Settings**

To edit your personal settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and click Account Settings from the left tree view. The user settings will load in the content window and the following tabs will be available:

#### **User**

Use this tab to specify the following user-based settings:

- Username - The identifier the user uses to log in to SmarterMail.
- Password - The corresponding password used to log in to Smartermail.
- Display Name - The name displayed on outgoing messages.
- Reply-to Email Address - The XXX
- Time Zone - The time zone the used.
- Disable Greylisting - Select this option to disable greylisting.

#### **Web Mail**

Use this tab to specify the following Webmail settings:

- Initial Page on Login - The page users will see upon logging in to SmarterMail.
- Display Format - To specify the default format in which messages are displayed, select the appropriate option from the list.
- 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.
- 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 - The order in which messages are displayed. By default, messages are displayed by date in descending in order.
- Auto Refresh Rate - How frequently SmarterMail checks for new messages.
- Items per Page - The number of emails that appear on each page.
- Upcoming Appointments - The number of days that appear in the Upcoming Appointments section of the My Today Page.
- Delete Action - To specify the action performed on deleted messages, select the appropriate action from the list.
- Move to Deleted Items folder - Deleted items will appear in the deleted items folder, which will need to regularly be emptied.
- Auto Purge Folder - XXX.
- Mark as deleted - Flags the message for deletion, but it will not be removed until the folder is purged.
- Mark as deleted and hide - Flags the message for deletion and hides it from view, but it will not be removed until the folder is purged. Note: 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 - To specify the placement of the preview pane, select the appropriate option from the list.
- Reports Chard Type - To specify how reports are displayed, select the appropriate option from the list.
- Enable Automatic Preview - Select this option to automatically display the first message of the folder you are viewing.
- Enable automatic mark as read for previewed messages - Select this option to automatically mark previewed messages as read.
- Disable automatic image loading in preview pane - Select this option to prevent images when viewing messages in the preview pane.
- Disable scroll bars in pulldown menus - Select this option to display items in longer menus in a scrollable list.

- Enable popups when reading messages - Select this option to load messages in a popup window when they are double-clicked.
- Enable popups when editing calendars - Select this option to load calendar appointments in a popup window when they are double-clicked.
- Enable popups when editing contacts - Select this option to load contacts in a popup window when they are double-clicked.
- Enable popups when editing notes - Select this option to load notes in a popup window when they are double-clicked.
- Enable popups when editing tasks - Select this option to load tasks in a popup window when they are double-clicked.
- Enable Automatic Reminder Popup - Select this option to display reminders in popup windows.
- Disable reminders for appointments and tasks - Select this option to disable appointment and task reminders.
- Enable Sounds - Select this option to allow sound throughout SmarterMail.
- Enable Chart Animation - Select this option to enable animation for Silverlight charts.

## Compose

Use this tab to specify the following settings for writing emails:

- Compose Format - To select the default format in which messages are created, select the appropriate option from the list.
- HTML - Use this option if you wish to add stylistic elements to your emails.
- 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 - To specify the default font and font size for emails, select the appropriate option from the list.
- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list.
- Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list.
- Forwarding Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
- Normal - Includes original content, including font styles from original message, as part of the new message.
- Text - 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** - To specify how frequently SmarterMail saves a draft of a message you are writing, select the appropriate option from the list.
- **Reply Header Type** - To specify the header type, select the appropriate option from the list.  
Note: 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** - The character appended to the beginning of each line of the original message in a message reply.
- **Enable inclusion of previous replies in reply** - Select this option to embed the text of the original message in a message reply.
- **Enable Sent Items Folder** - Select this option to save all outgoing messages in the Sent Items folder. Note: If you send many messages, you may need to delete items from this folder regularly.
- **Enable popup for new messages and replies** - Select this option to compose or reply to messages in a new popup window.
- **Disable closing of messages when replying** - Select this option to prevent SmarterMail from closing the original message when composing a reply.
- **Enable read receipts by default** - Select this option to create read receipts for all outgoing messages.
- **Enable trusted sender for Webmail recipients** - Select this option to add email addresses to which you have sent mail to your trusted senders list.

## **Forwarding Use this tab to set up SmarterMail to forward received messages to another email account.**

- **Forwarding Address** - The email address to which messages will be forwarded.
- **Enable deletion of message on forward** - Select this option to automatically delete messages from your SmarterMail inbox after they are forwarded.

## **Plus Addressing**

Plus Addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. For more information, see [Plus Addressing](#) .

- **Action** - The action SmarterMail should take when a plus-addressed email is received.
- **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 in to your inbox.
- Enable Plus Addressing - Check this box to enable plus addressing.

## 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."

## Trusted Senders

This setting allows users to list specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. Email addresses or domain names can be added to your list of trusted senders. This can prevent mail from friends, business associates, and mailing lists from being blocked and lets the system know that these messages come from a trusted source. Note: The email address for messages that you unmark as spam are automatically included on your trusted senders list.

To view your trusted senders list, click the Settings button in the main toolbar and then click the Settings navigation pane. Then expand the My Settings folder and click Trusted Senders in the left tree view. When adding a new trusted sender to the list, make sure to type only one email address or domain per line.

## Signatures

An email signature is a block of text automatically appended at the bottom of an email message. Signatures may contain the sender's name, address, phone number, disclaimer, or other contact information.

To access your signature settings, click the Settings button in the main toolbar and then click the Settings navigation pane. Then expand the My Settings folder and click Signatures in the left tree view. The signature settings will load in the content pane and the following tabs will be available:

### Mappings

Use this tab to assign a signature to your mailbox.

### Signatures

Use this tab to create or edit signatures. To create a new signature, click New in the actions toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the actions toolbar.

## Message Retrieval

Message Retrieval allows users to access email on another server through the SmarterMail Web interface. Note: This feature is only available to users if their system administrator has enabled message retrieval.

To view your message retrieval settings, click Settings in the main toolbar and then click the Settings navigation pane. Expand the My Settings folder and click Message Retrieval in the left tree view.

## POP Retrieval

SmarterMail's POP retrieval service will download email messages from another server via POP3 and deliver them to your SmarterMail mailbox. When creating a new account for POP message retrieval, the following options are available:

- Server Address - The address for the email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 110.
- Username - The identifier used to authenticate with the email server.
- Password - The corresponding password used to authenticate with the email server.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server.

Note: If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve in the actions toolbar to check for new messages.

- Destination Folder - The folder in which messages downloaded from the server are saved.
- Enable APOP Authentication - Select this option if the server requires additional login security.
- Leave Messages on Server - Select this option to keep your messages on the server after they are downloaded to your SmarterMail mailbox.
- Requires SSL - Select this option if the connection to the server must be SSL.
- Enable Spam Filtering - Select this option to apply your SmarterMail spam and content filtering settings to any messages downloaded from this server

## IMAP Retrieval

SmarterMail's IMAP retrieval service will download email messages from another server via IMAP and deliver them to your SmarterMail mailbox. When creating a new account for IMAP message retrieval, the following options are available:

- Server Address - The address for the email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 143.
- Username - The identifier used to authenticate with the email server.

- Password - The corresponding password used to authenticate with the email server.
- Retrieval Method - The method by which SmarterMail checks for new messages on the server.  
Note: If you choose to manually retrieve messages, you will have to load the Message Retrieval page and click Retrieve in the actions toolbar to check for new messages.
- Folder Transfer Method - The method by which SmarterMail imports any email folders from the server.
- Requires SSL - Select this option if the connection to the server must be SSL.

## SMTP Accounts

Setting up an SMTP account allows you to send email from an external server from within Smartermail. Generally, you will also want to set up the corresponding Message Retrieval information.

To view your message retrieval settings, click Settings in the main toolbar and then click the Settings navigation pane. Expand the My Settings folder and click SMTP Accounts in the left tree view.

When creating a new SMTP account, the following options are available:

- Server Address - The address for the external email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 25.
- Display Name - The name that appears in the From field of emails.
- Email Address - The email address that corresponds to the external email server.
- Username - The identifier used to authenticate with the external email server.
- Password - The corresponding password used to authenticate with the external email server.
- Encryption - The type of encryption required by the external email server.
- Enable Authentication - Select this option if SMTP authentication is required to send mail from this email address.

## 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 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.

## Sharing

### Shared Objects Overview

This feature is only available in SmarterMail Enterprise edition.
---

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 only available in SmarterMail Enterprise edition.

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 only available in SmarterMail Enterprise edition.

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.

## Events

### Overview

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

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

### Manage Events

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

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

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

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

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

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

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

Searching an Event - To search your events, first click the Search icon from the actions toolbar.

Another toolbar will appear under the actions tool bar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, Event Category, Event Type, Conditions, or Actions.

## Create a New Event

To add a new event, select New Event from the left tree view.

The event page is split into two tabs for easy use—Options and Actions.

### Options Tab

Name - Allows you to assign a specific name to your event.

Event Group - Allows you to select a folder in which to store/associate your event subscriptions.

- To add a new Event Group, click the Plus Sign icon on the folders toolbar.
- To edit an Event Group, select the Event Group you wish to Edit and then click the Pencil icon on the folders toolbar.

Event Category - Select the trigger category for your notification. For more information about specific event categories, select a category for the Event Categories folder.

Event Type - This is a specific trigger relating to the Event Category.

Based upon the Event Category and Event Type that was chosen, different parameters will be available for you to choose to help set up your event.

### Actions Tab

When clicking the Actions tab the screen will be blank. To add a new event, click the Add Action icon from the actions toolbar.

Action - This defines how the system will alert you.

Max Frequency - This allows you to set how often you want to be notified.

Notification Profile - This allows you to choose which profile you want to use.

From Address - This is the email address from which the email will be sent from.

Subject, Short Body, and Body will all be populated by the system using the variables from the bottom.

Once all fields are complete, click the Save icon from the actions toolbar to save that event.

## Notification Profiles

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

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

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

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

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

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

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

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

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

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or

- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

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

## **Event Categories**

### **Aliases**

#### **Alias Added**

Users of SmarterMail can set up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has added a new alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

#### **Alias Deleted**

Users of SmarterMail can set up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has deleted an existing alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

## Collaboration

### Calendar Reminder Occured

SmarterMail gives users the ability to set up reminders to alert them of upcoming appointments within their calendar. Users of SmarterMail can utilize the attributes listed below to alert them of when a reminder has occurred.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Location - Enter a meeting location to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

### Task Reminder Occurred

SmarterMail gives users the ability to set up reminders to alert them of upcoming deadlines for particular tasks. Users of SmarterMail can utilize the attributes listed below to alert them when a reminder for a task has occurred.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Priority - Enter the priority level to trigger this event.

Percent Complete - Enter the percent complete of a task to trigger this event.

Status - Enter the status of a task to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

## **Domain**

### **Domain Added**

Administrators may want to monitor when domains have been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new domain has been added to the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used - Enter the number of domains that will trigger this event.

Domains User (%) - a percentage of the total number of domains allowed to trigger this event.

### **Domain Deleted**

Administrators may want to monitor when a domain has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a domain has been deleted from the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used -

Domains User (%) -

### **Domain Disk Space Used**

The amount of disk space a domain uses is very important for administrators to monitor. Administrators can utilize the attributes listed below to be notified when a domain reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain Usage (%) - Enter the percentage of disk space used to trigger this event.

Domain Usage (MB) - Enter the disk space used in MB to trigger this event.

Domain - Enter a domain to trigger this event.

## **Email**

### **Email Message Received**

Users can utilize the attributes listed below to be notified when they receive a message within SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is received from within the domain.

Spam Level - Select the spam level you want to have trigger this event.

### **Email Message Sent**

Users can utilize the attributes listed below to be notified when a message is sent from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.



Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is sent within the domain.

## **Mailing Lists**

### **Mailing List Added**

Mailing lists can be very time consuming and can slow down the efficiency of a server when being sent. Administrators can utilize the attributes listed below to alert them when a new mailing list has been added to the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

### **Mailing List Deleted**

Administrators can utilize the attributes listed below to alert them when a mailing list has been deleted from the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

### **Message Sent to Mailing List**

Administrators can utilize the attributes listed below to be notified when a message has been sent to a mailing list.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

## **Security**

### **Abuse Detection Rule Triggered**

The monitoring of Security for an administrators system and/or domain is very important.

Administrators would and need to know if a domain or user has abused any rule that has been put in place. Administrators can utilize the attributes listed below to be notified when a rule has been abused.

Attributes

Time of Day - Enter a time of day to trigger this event.

Rule Type - Select the security rule that you want to trigger this event.

IP Address - Enter an IP address that will trigger this event.

Rule Name - Enter a name for the rule to trigger this event.

### **ClamAV Failure**

ClamAV is a 3rd party source integrated with SmarterMail to help detect and prevent viruses from entering the system. Administrators can utilize the attributes listed below to notify them when there has been a failure with the ClamAV service.

Attributes

Time of Day - Enter a time of day to trigger this event.

ClamAV IP - Enter the IP address of the ClamAV server that will trigger this event.

ClamAV Port - Enter the port of the ClamAV server that will trigger this event.

Consecutive Failures - Enter the number of failures that needs to be reached to trigger this event.

File Name - Enter the name of the file to trigger this event.

File Size (KB) - Enter the size of the file in KB that will trigger this event.

## Outgoing Message Blocked

Administrators may want to know if outgoing messages are being blocked so they can further investigate why and from whom the message was sent. Administrators can utilize the attributes listed below to be notified when an outgoing message was blocked.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Spam Weight - Enter the spam weight of the message that will trigger this event.

File Name - Enter the name of the file to trigger this event.

## Virus Found

Viruses can be very harmful to SmarterMail or the entire system. Administrators can utilize the attributes listed below and be notified if a virus gets through the ClamAV service and is found.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Virus Name - Enter the name of a virus that will trigger this event.

File Name - Enter the name of the file to trigger this event.

## System

### Gateway Failure

Administrators can utilize the attributes listed below to be notified when a gateway server has failed so they can correct the problem as soon as possible.

Attributes

Time of Day - Enter a time of day to trigger this event.

Gateway Address - Enter the address of the gateway that will trigger this event.

## License Expiration

Administrators may be using a trial license to experiment with a new product and will want to know when it expires. Administrators can utilize the attributes listed below to be notified when the license is close to expiration.

Attributes

Time of Day - Enter a time of day to trigger this event.

Days Left - Enter the number of remaining days that will trigger this event.

## Memory

Memory is very important for a mail server to maintain the best efficiency possible and domains and users may be set at a certain maximum. Administrators can utilize the attributes listed below to be notified when the domain or user reaches a certain memory level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Memory Used (%) - Enter the percentage of memory used that will trigger this event.

Memory Used (MB) - Enter the amount of memory used in MB that will trigger this event.

## New Version Available

Administrators can utilize the attributes listed below to be notified when a new version has been made available.

Attributes

Time of Day - Enter a time of day to trigger this event.

Version - Enter version that will trigger this event.

## Service Started

Administrators may want to know if and when a new service has been started. Administrators can utilize the attributes listed below to be notified when a new service has been started.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

## Service Stopped

Administrators may want to know when a service has been stopped. Administrators can utilize the attributes listed below to be notified when a service has been stopped.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

## Spool Count

The number of messages within the spool can be very important when the number reaches a certain level which could mean a problem within the system. Administrators can utilize the attributes listed below to be notified when the spool count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Spool Count - Enter the number of messages in the spool that will trigger this event.

## System Settings Changed

Administrators can utilize the attributes listed below to be notified when any settings have been changed within the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

## System Uptime

Administrators may want to monitor the total amount of time the system has been running and can utilize the attributes listed below to notify them when it reaches a certain point.

Attributes

Time of Day - Enter a time of day to trigger this event.

Uptime (Days) - Enter the number of days the system has been running that will trigger this event.

## Threads

Administrators will want to monitor concurrently running threads to ensure the system to be running at the maximum efficiency. Administrators can utilize the attributes listed below to be notified when the thread count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Thread Count - Enter the number of threads that will trigger this event.

## Throttling

### Domain Throttled

Administrators can put a throttling threshold on a particular domain within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a domain reaches the throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

### User Throttled

Administrators can put a throttling threshold on a particular user within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a user reaches that throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

## User

### User Added

Administrators may want to monitor when a new user has been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new user has been added to SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

### User Deleted

Administrators may want to monitor when a user has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a user has been deleted from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

### User Disk Space Used

The amount of disk space a user utilizes is very important for administrators to monitor, because domains may only be given a certain amount of disk space to use. Administrators and users can utilize the attributes listed below to be notified when a particular user reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Mailbox Usage (%) - Enter the percentage of the mailbox used that will trigger this event.

Mailbox Usage (MB) - Enter the size in MB of the mailbox used that will trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

## **Additional Help Topics**

### **Mailing Lists**

Generally, users do not have the ability manage mailing lists. However, the domain administrator may assign an user as the moderator of a specific mailing list. If a user is the moderator of a mailing list, the user will be able to create new mailing list messages from his inbox. In addition, the user will have access to the mailing list settings for which he is a moderator. For more information, see Mailing Lists.

### **Plus Addressing**

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

#### **Example 1**

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, all you have to do is sign up for the newsletter with the plus address myname+ACME@example.com Note: When writing the plus address, make sure the folder name is listed 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.

#### **Example 2**

If you include the "/" character in your plus address, you can automatically create sub-folders. For example, the plus address myname+Newsletters/ACME@example.com 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

For step-by-step instructions on enabling plus addressing, please refer to the KB article [How To - Enable Plus Addressing](#).

# Synchronization

## Synchronization Overview

This feature is only available in SmarterMail Enterprise edition.

SmarterMail uses multiple data synchronization technologies to sync mailbox data with email clients and mobile devices:

- Microsoft Exchange ActiveSync is an optional add-on that syncs SmarterMail mailboxes with most smartphones.
- SmarterMail Sync is a desktop utility that syncs SmarterMail mailboxes with Outlook and Windows Mobile devices.
- SyncML is a platform-independent information synchronization standard that syncs SmarterMail mailboxes with Outlook, Thunderbird, and most smartphones.

In addition, the Add to Outlook button in the SmarterMail Webmail interface uses two-way synchronization technology to sync a SmarterMail mailbox with Outlook.

For more information regarding the different synchronization methods available for SmarterMail 6.x, please refer to the [Collaboration, Synchronization, and Over-the-Air Mobile Communications with SmarterMail](#) document on the Help and Documentation page of the SmarterTools website.

## SmarterMail Sync

This feature is only available in SmarterMail Enterprise edition.

SmarterMail Sync is a desktop utility developed by SmarterTools that allows you to quickly and easily synchronize your calendars, contacts, tasks, and notes with Microsoft Outlook and Windows Mobile devices.

SmarterMail Sync uses port 80 (HTTP) to connect to your SmarterMail server, then uses internal

methods to synchronize your data with Outlook and Windows Mobile devices. In most cases, this process is completely automatic. If a conflict occurs, you will be asked how to handle the conflict.

## Installing SmarterMail Sync

The latest versions of SmarterMail Sync is available from within the SmarterMail interface. To view the available versions of SmarterMail Sync, log in to your SmarterMail account and click Settings in the main toolbar. Then click the Settings navigation pane and click SmarterMail Client Utilities in the left tree view. Download and install the appropriate version(s) of the utility.

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

## Microsoft Outlook Synchronization

Before you can synchronize any SmarterMail mailboxes with Outlook using SmarterMail Sync, you will need to configure your account for synchronization. For more information, please refer to the KB article [How To - Configure SmarterMail Accounts for Synchronization Using SmarterMail Sync](#).

For step-by-step instructions on synchronizing accounts using SmarterMail Sync, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Outlook Using SmarterMail Sync](#). In the course of synchronizing accounts, conflicts may occur. For example, if you update a contact in Outlook and in SmarterMail, the changes may conflict with one another. In this case, SmarterMail Sync will ask you how the conflict should be handled.

## SyncML

This feature is only available in SmarterMail Enterprise edition.
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SyncML (Synchronization Markup Language), also referred to as Open Mobile Alliance Data Synchronization (OMA DS), is a platform-independent open standard for synchronization of information. It is most commonly used to synchronize and/or back up contacts and calendars between mobile phones and a network-based service or computer.

SmarterMail uses the Funambol SyncML plug-in for synchronizing calendars, contacts, tasks, and notes with Microsoft Outlook, Mozilla Thunderbird, and most smartphones.

## Microsoft Outlook and Mobile Synchronization

Before you can synchronize any SmarterMail mailboxes with Outlook using SyncML, you will need to configure your account for synchronization. For more information, please refer to the KB article [How To - Configure SmarterMail Accounts for Synchronization Using SyncML](#).

For step-by-step instructions on synchronizing accounts with Microsoft Outlook using SyncML, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Outlook Using SyncML](#).

For step-by-step instructions on synchronizing accounts with smartphones using SyncML, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Mobile Devices Using SyncML](#).

## Microsoft Exchange ActiveSync

This feature is only available in SmarterMail Enterprise edition.
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Microsoft Exchange ActiveSync is a data synchronization protocol that enables over-the-air access to email, calendars, tasks, and notes from most mobile devices, including Blackberry, iPhone, Palm Pre, and Windows Mobile devices. In addition, Exchange ActiveSync enables SmarterMail users to have access their email, calendars, tasks, and notes while working offline.

Exchange ActiveSync is available as an optional add-on from SmarterTools and is associated to a single SmarterMail license key at the time of purchase. For more information, please refer to the SmarterMail Add-ons tab on the SmarterTools website.

### Configuring Exchange ActiveSync

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail. For step-by-step instructions, please refer to the KB article [How To - Activate Microsoft Exchange ActiveSync](#). Then the system administrator will need to enable Exchange ActiveSync for your mailbox. For more information, please refer to the KB article [How To - Configure Microsoft Exchange ActiveSync for Email Accounts](#).

### Mobile Synchronization

For step-by-step instructions on synchronizing a SmarterMail mailbox using Exchange ActiveSync, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Mobile Devices using Exchange ActiveSync](#).