



SmarterMail 7.x

Help Documentation

SmarterMail Help

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

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

Common Help Topics for Users

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

Common Help Topics for Domain Administrators

- Adding email accounts
- Adding email aliases
- Configuring Spam Filtering

Common Help Topics for System Administrators

- Logging in for the first time
- Adding a domain
- Proper DNS configuration
- Locking down your server

Getting Started

Getting Started Overview

SmarterMail is a feature-rich Windows mail server that brings the power of enterprise-level features and collaboration to businesses and hosting environments. Use the Getting Started section of the SmarterMail Online Help as a quick resource to help you set up the application.

Step 1: Download SmarterMail

SmarterMail comes as a single installation file that contains everything necessary to run the product. Download the SmarterMail installation file from the SmarterTools website .

Step 2: Install SmarterMail

Run the InstallShield Wizard. Please refer to the KB article [How To - Install SmarterMail](#) for step-by-step installation instructions.

Step 3: Run Setup Wizard

After the InstallShield Wizard is finished installing SmarterMail, the Setup Wizard will open. The Setup Wizard will walk you through the activation of the product and help you set up the hostname, system administrator username and password, DNS servers, default file path for SmarterMail, Clam AV, spam profiles, and greylisting.

Note: If the Setup Wizard does not open automatically, you will need to login to SmarterMail as the system administrator and the wizard will automatically load. For more information, see [How to Login](#)

Step 4: Convert to IIS

If you are running IIS 5.0 or later, convert the SmarterMail Web interface to run under IIS. For more information, see [Running SmarterMail as an IIS Site](#) .

Step 5: Activate SmarterMail

You may have activated the product while running the Setup Wizard. If you did not, the product will run as the Free edition upon logging in as the administrator for the first time. To activate the Professional or Enterprise edition of the software, you will need a valid license key. For more information, see [Activating SmarterMail](#) .

Step 6: Add Domain

Now that SmarterMail is installed and activated, you will need to add a domain to SmarterMail. Adding a domain to SmarterMail represents your business entity and the domain name (such as example.com) will be used in the creation of user mailboxes. Note: Only domains that you purchased and own should be added to SmarterMail.

For more information, see [All Domains](#) or the KB article [How To - Add a Domain to SmarterMail](#) .

Step 6: Configure the Network

Now that you've created your domain, you'll need to configure the DNS and port settings for the domain. Configuring DNS settings is important because these settings tell the Internet where to send email on your domain. For step-by-step instructions on configuring DNS settings, see the KB article [How To - Configure DNS for a Domain](#) . In addition, you will need to ensure that the ports on your firewall is open for ports 25, 110, and 143. Note: Your ISP might block specific ports, so it is recommended to contact your ISP to ensure SMTP traffic on these ports is allowed.

Step 8: Add Users

Now that your domain and network configurations are set up, you need to manage the domain by adding users. Add users to the domain. Any individual that should receive mail or have their own mailbox should be added as a users on the domain. This will create a mailbox and email address for them (i.e., user@example.com). For more information, see [Users](#) or the KB article [How To - Create a User in SmarterMail](#) .

Step 8: Login to Webmail

Login to the webmail interface as a user. The webmail interface is how users access their email messages, manage contacts, and configure their own content filtering rules and spam settings (if enabled). For more information, see [How to Login](#) .

General Information

What is SmarterMail?

SmarterMail is fully RFC compliant mail server package that is able to support anywhere from one to an unlimited number of domains and an unlimited number of email addresses and that includes complete webmail and anti-spam features. It is built and priced to be both beneficial and accessible to individuals, small businesses, and enterprise-level organizations alike.

SmarterMail provides end users with advanced features such as mail account statistics, user level skinning, and precise user-controlled spam and content filtering. Domain administrators have the ability to set and retrieve domain level statistics, provide domain-level spam and content filtering (versus having individual end users set their own), administer spam using any number of different spam and black lists (e.g. SpamCop, SpamAssassin, ORDB, and others), set a domain-level skin, set domain-level aliases, implement SMTP authentication, and much more.

As an added benefit, both the administrative functions of SmarterMail, as well as end user capabilities are accessible from a standard web browser, giving administrators and end users access and control at anytime, from anywhere. SmarterMail uses industry standard mail protocols, such as POP3 and IMAP4 for incoming mail and SMTP for outgoing mail. It is also compatible with most popular desktop email clients (e.g. Microsoft's Outlook and Outlook Express or Qualcomm's Eudora).

How SmarterMail Works

There are three main components that work together within SmarterMail: the Web Interface, the Windows Service, and the SmarterMail Web Server.

Web Interface

The Web Interface is a browser based administration platform that installs on a single server and supports administration of domains and email accounts as well as email account access by end users. End users are able to access and use their accounts via web mail (email account access using a web browser) or a desktop application (e.g. Outlook or Outlook Express, or Qualcomm's Eudora).

Windows Service

The SmarterMail Service is the backbone of SmarterMail. Running as a Windows Service, it controls data storage and retrieval, protocol services, and administrative functions. SmarterMail will not function without this service installed and running.

SmarterMail Web Server

The SmarterMail Web Server installs with the SmarterMail Web Interface "right out of the box". This Web Server gives users and administrators access to the SmarterMail Web Interface from the Internet by utilizing the IP address assigned to the local machine.

NOTE: After installing SmarterMail, it is recommended that the Web Interface be moved from the SmarterMail Web Server to Microsoft IIS (if available) for more stability and security. For step-by-step instructions on how to make SmarterMail run under IIS, see Running Web Interface under IIS help topic.

Browser Requirements

SmarterMail is fully supported by the browsers below.

- Internet Explorer 6 and higher
- Google Chrome 2 and higher
- FireFox 2 and higher
- Safari 3 and higher
- Opera 10 and higher

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Interface components produced by



Charting component produced by



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Release Notes

Current release notes are available at

<http://www.smartertools.com/Products/SmarterMail/ReleaseNotes.aspx>

Installation and Deployment

SmarterMail System Requirements

SmarterMail was designed to coexist with multiple applications on the same server based on the following minimum requirements:

- Windows XP*, Windows Vista*, Windows Server 2003 or higher
- SmarterMail Web server included with product
- Microsoft .NET 3.5 Framework

However, SmarterTools recommends the following requirements for maximum efficiency:

- Windows Server 2003 or higher
- Microsoft IIS 7.0**
- Microsoft .NET 3.5 Framework

Note: Each installation and environment is unique. Extra load caused by excessive messages or email accounts and/or other factors may require more disk space, memory, database allocation, etc. than suggested in the online help. SmarterTools recommends that system administrators slowly add domains to the server and watch how they impact the server. In addition, email patterns indicate that the number of email messages per account are increasing by approximately 60% every two years. It is important to keep this growth in mind when planning your rollout.

*Microsoft's non-server based operating systems limit the maximum number of inbound connections to 10. For more information regarding this issue, refer to the Windows Vista EULA or the Windows XP Pro EULA .

**SmarterMail includes a basic Web server, so the product is fully function upon installation□even without the existence of IIS or other Web servers. However, SmarterTools recommends installing Microsoft IIS 7.0 in place of the SmarterMail Web server for increased performance and security. For more information, see Running SmarterMail as an IIS Site .

Installation

SmarterMail comes as a single installation file that contains everything necessary to run the product. The SmarterMail installer can be downloaded from <http://www.smartertools.com> . Both the free and the licensed editions of SmarterMail are contained within this installation file, so it is not necessary to download or install the file again if you purchase a license after trying the free edition.

Please refer to the KB article [How To - Install SmarterMail](#) for step-by-step installation instructions.

Running as an IIS Site

By default, SmarterMail installs a basic Web server that allows companies to start using the application immediately after installation. However, SmarterTools recommends moving to a more robust and secure Web server, such as Microsoft IIS. For step-by-step instructions on configuring SmarterMail to run with Microsoft IIS 7.0, please refer to the KB article [How To - Set up SmarterMail as an IIS Site](#).

Alternatively, you may run SmarterMail as a virtual directory under an existing site. However, this is not recommended. For more information, please refer to the KB article [How To - Set Up SmarterMail as a Virtual Directory Under and Existing IIS Site](#).

Note: This help topic assumes familiarity with Microsoft IIS and how it works. SmarterTools recommends using the basic Web server included with SmarterMail if you are unfamiliar with or uncomfortable using Microsoft IIS.

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Activating SmarterMail

In order for SmarterMail to function for more than 10 users, the product must be activated using a valid license key. In addition, if SmarterMail is moved to another server or assigned to a different database, the product may need to be reactivated.

To access the product activation wizard, click the Settings button in the main toolbar. Then expand the Activation folder and click Licensing in the left tree view. The edition and license level information for the version of SmarterMail currently being used will load in the content pane.

To activate or reactivate a valid license key, click the Activate button in the actions toolbar. For step-by-step activation instructions, please refer to the KB article [How To - Activate SmarterMail](#). Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request.

[Return to Getting Started](#)

Upgrading SmarterMail

Because the SmarterMail 6.x download contains all of the installation files needed for any licensing level or edition, upgrading editions or levels is relatively easy. With a valid license key, companies can easily upgrade to the professional or enterprise editions or increase the number of mailboxes

available in SmarterMail. For more information, see the [Activating SmarterMail](#) section of the online help. For step-by-step instructions, please refer to the KB article [How To - Upgrade SmarterMail Levels and Editions](#) .

The steps for upgrading to SmarterMail 6.x from an older version of the application vary depending on which version you are currently using. For more information, please refer to the KB article [How To - Upgrade SmarterMail](#) .

SmarterMail Add-ons

SmarterTools' add-on licensing system allows users to enhance the functionality of SmarterTools products. The following add-ons are available for SmarterMail 7.x:

- Microsoft Exchange ActiveSync
- Commtouch Premium Antispam
- Commtouch Zero-hour Antivirus

Microsoft Exchange ActiveSync

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.

For step-by-step instructions on how to activate and enable the Exchange ActiveSync add-on, please refer to the KB articles [How To - Activate Microsoft Exchange ActiveSync](#) and [How To - Configure Microsoft Exchange ActiveSync for Email Accounts](#) .

Commtouch Premium Antispam

The Commtouch Premium Antispam add-on uses Recurrent Pattern Detection (RPD) technology to protect against spam outbreaks in real time as messages are mass-distributed over the Internet. Rather than evaluating the content of messages, the Commtouch Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge.

For step-by-step instructions on how to activate and enable the Commtouch add-on, please refer to the KB articles [How To - Activate Commtouch Premium Antispam](#) and [How To - Enable Commtouch Premium Antispam](#) .

Commtouch Zero-hour Antivirus

The Commtouch Zero-hour Antivirus add-on identifies viruses based on their unique distribution patterns and provides a complementary shield to conventional AV technology, protecting in the earliest moments of malware outbreaks and continuing protection as each new variant emerges.

For step-by-step instructions on how to activate and enable the Commtouch add-on, please refer to the KB articles [How To - Activate Commtouch Zero-hour Antivirus](#) and [How To - Enable Commtouch Zero-hour Antivirus](#).

SmarterMail Deployment Guides

SmarterTools provides three different deployment guides to help companies develop an effective architecture for their SmarterMail implementation based on their size.

Individuals and Micro-businesses

Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 in/12,500 out). This infers a maximum of 100 employees/users. Information regarding these architectures is available in the SmarterMail in [Individual and Micro-business Deployments](#) document.

Small to Medium-sized Businesses

Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 in/200,000 out). This infers a maximum of 1,600 employees/users. Information regarding these architectures can be found in the SmarterMail in [Small to Medium-sized Business Deployments](#) document.

High-volume Deployments

High-volume deployments shall include ISPs, hosting companies, large businesses, and enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of employees/users. Information regarding these architectures can be found in the SmarterMail in [High Volume Deployments](#) document.

Automation with Web Services

SmarterMail was designed to support custom configuration and automation. System administrators have the ability to access the SmarterMail application via exposed Web services, allowing for the automation of a variety of different tasks, including:

- Adding domains to SmarterMail
- Grabbing domain-specific bandwidth usage for billing purposes
- Setting details for a specific domain or server
- Updating domain information
- Testing servers recently added to the Web interface
- And more...

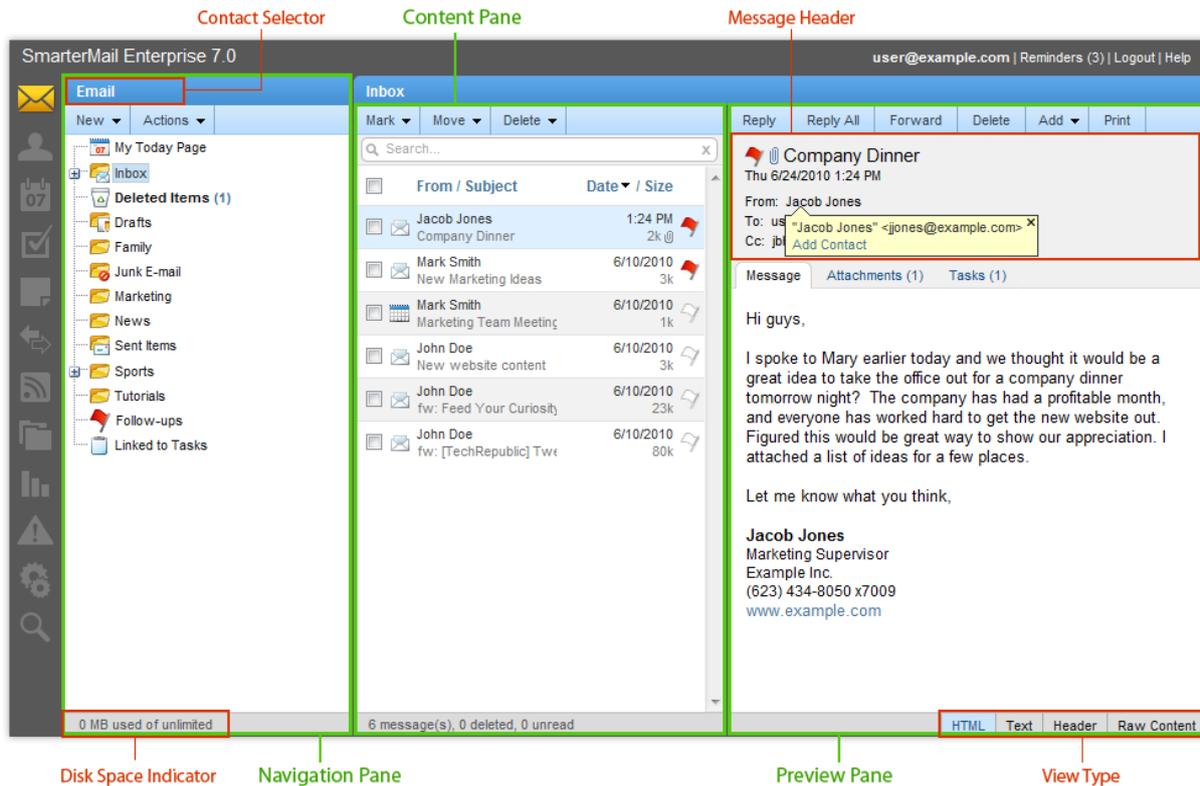
To view the Web services and the corresponding functions available to you, go to your default Web interface install location and append "services/SERVICENAME.asmx". With the default installation, you would use `http://127.0.0.1:9998/Services/svcServerAdmin.asmx`.

For more information, including a brief explanation of the available Web services, download the *Automation with Web Services* document.

Interface Diagrams

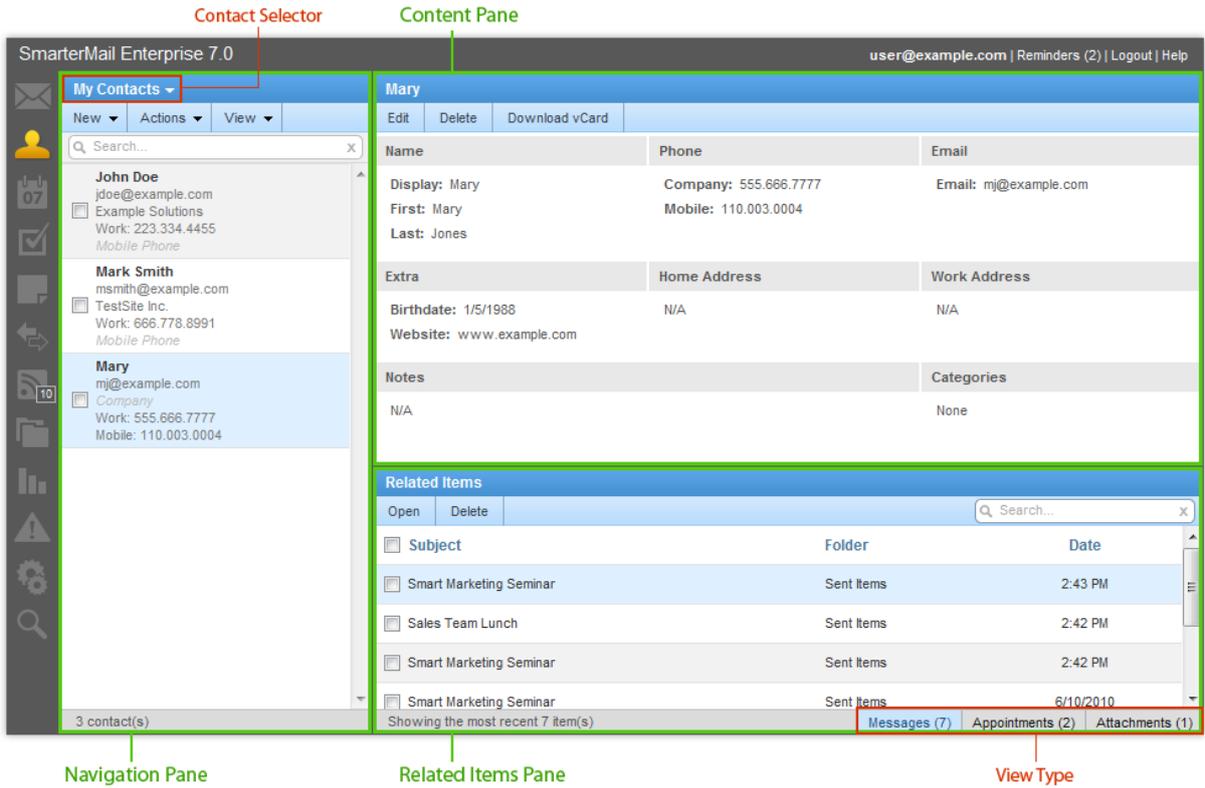
Inbox

To better understand the different areas of the inbox, please refer to the diagram below:



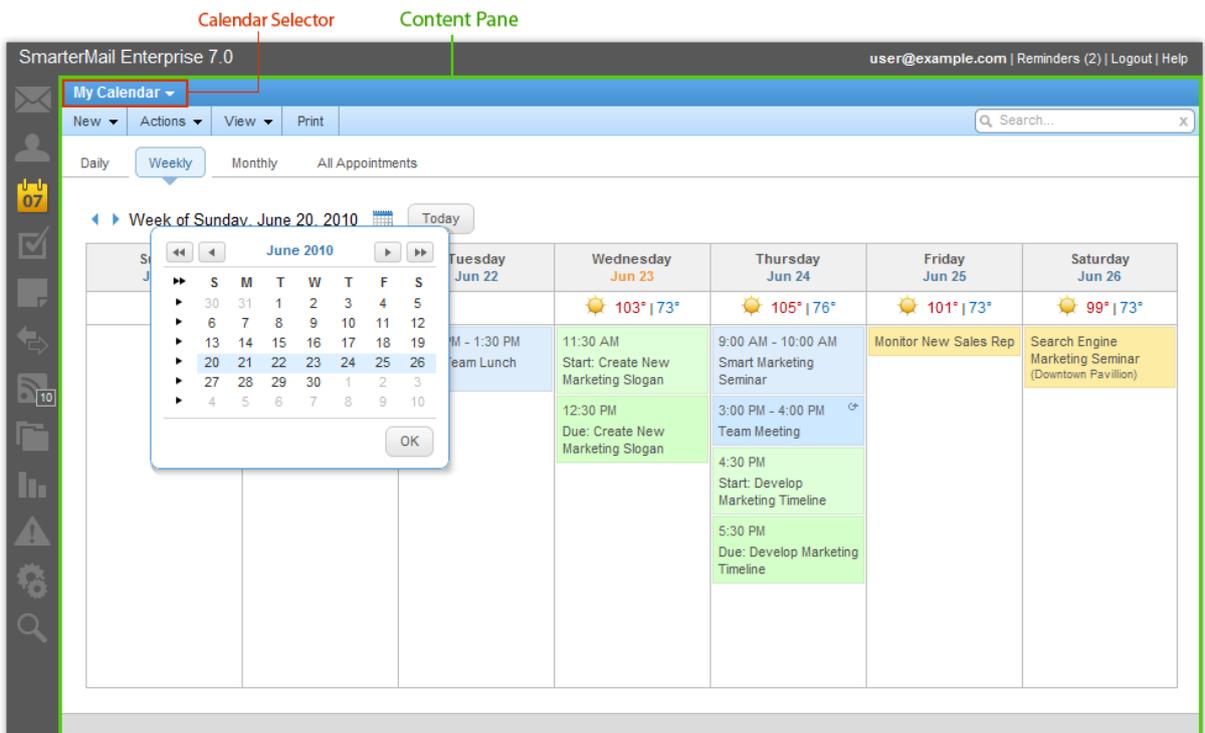
Contacts

To better understand the different areas of the contacts section, please refer to the diagram below:



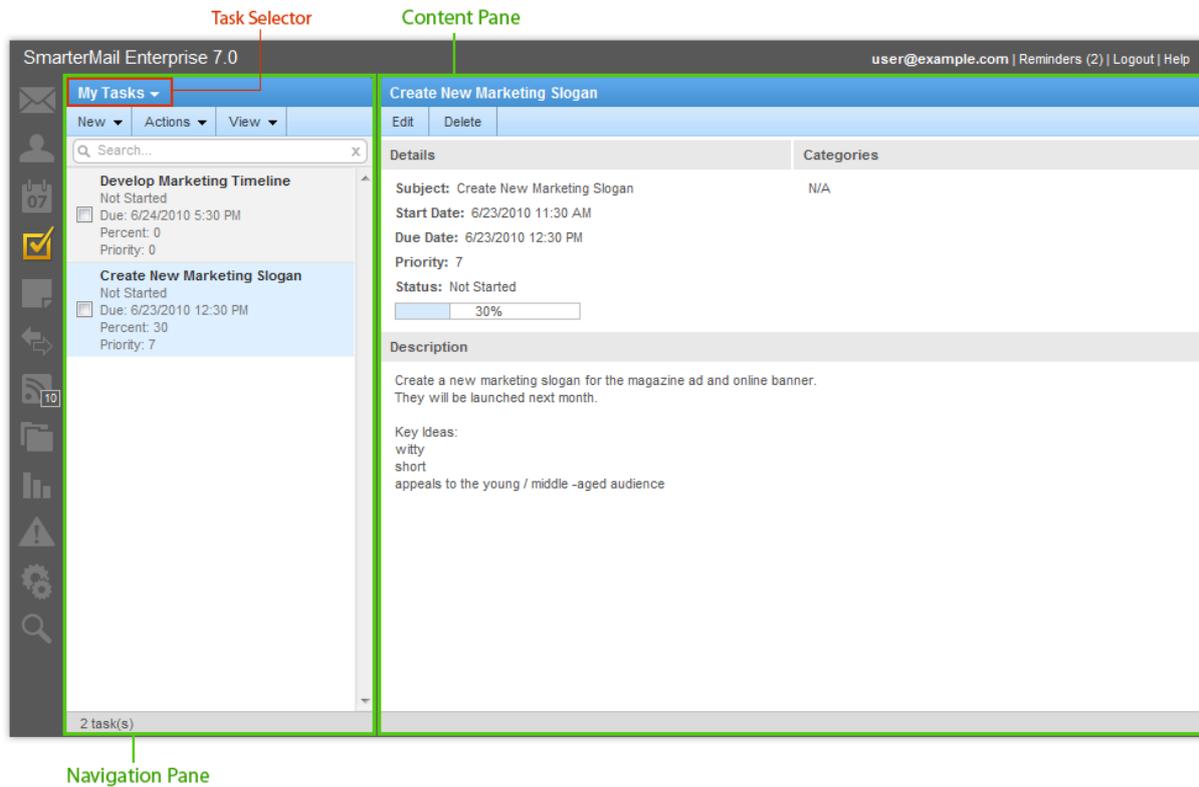
Calendar

To better understand the different areas of the calendar section, please refer to the diagram below:



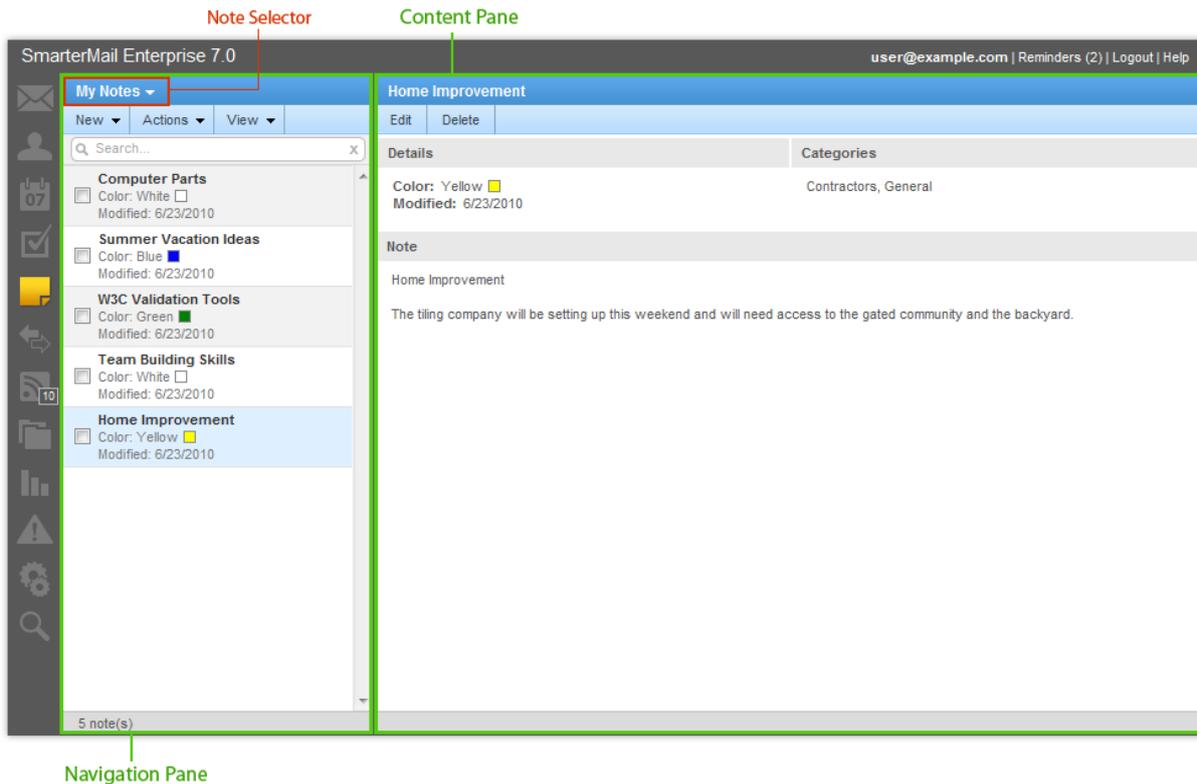
Tasks

To better understand the different areas of the tasks section, please refer to the diagram below:



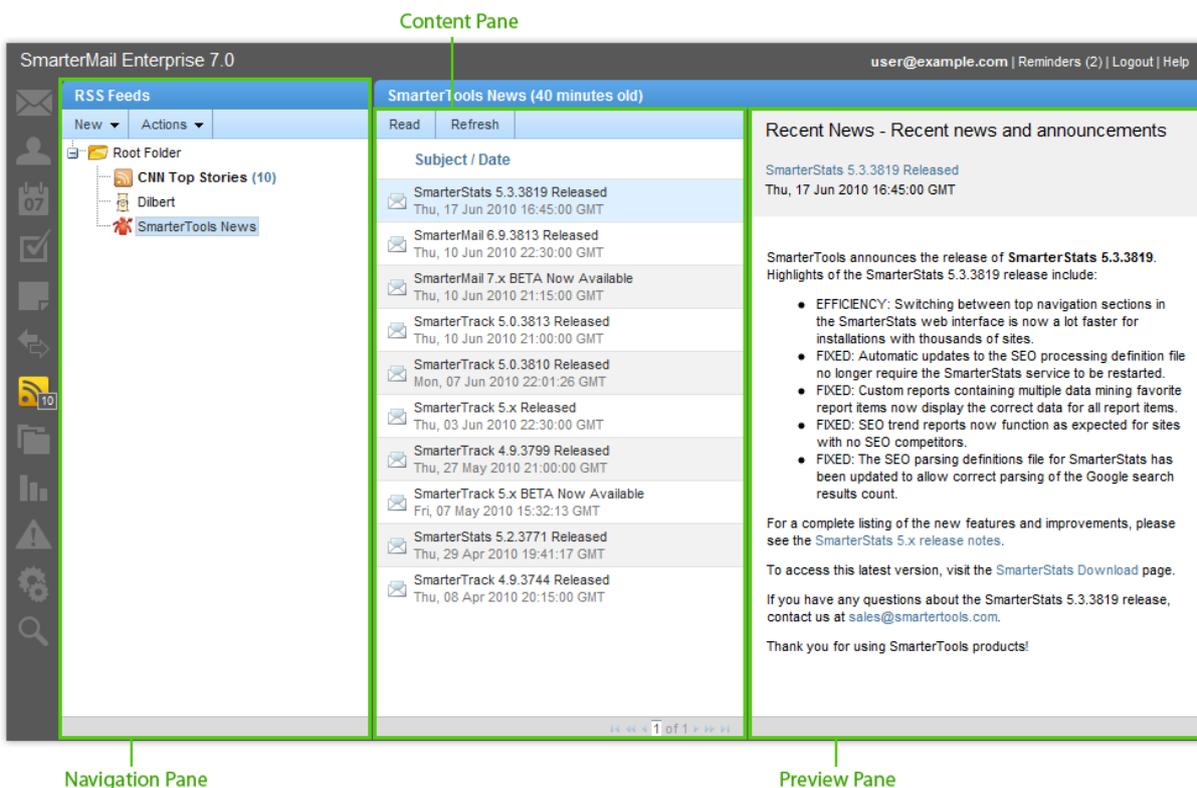
Notes

To better understand the different areas of the notes section, please refer to the diagram below:



RSS Feeds

To better understand the different areas of the RSS feeds section, please refer to the diagram below:



File Storage

To better understand the different areas of the file storage section, please refer to the diagram below:

Content Pane

SmarterMail Enterprise 7.0 user@example.com | Reminders (2) | Logout | Help

File Storage

Root Folder/Furniture

Filename	Size	Date Added	Public
Table1.jpg	27 KB	6/10/2010	<input type="checkbox"/>
Table2.jpg	33 KB	6/10/2010	<input type="checkbox"/>
Table3.jpg	29 KB	6/10/2010	<input type="checkbox"/>
Table4.jpg	27 KB	6/10/2010	<input type="checkbox"/>

Navigation Pane

0 MB used of unlimited

Reports

To better understand the different areas of the reporting section, please refer to the diagram below:

The screenshot displays the SmarterMail Enterprise 7.0 interface. On the left is the **Navigation Pane** with a tree view of reports. The main **Content Pane** shows the **Message Traffic Trend** report for the date range 6/17/2010 to 6/23/2010. The report includes a line chart and a data table.

Message Traffic Trend (user@example.com)
 Date Range: 6/17/2010 to 6/23/2010
 Chart: [Dropdown] Sort: [Dropdown] Group: [Dropdown]

Day	Incoming Messages	Outgoing Messages	Incoming Spam Messages	Outgoing Spam Messages
6/17/2010	20	5	1	-
6/18/2010	14	5	1	-
6/19/2010	3	3	-	-
6/20/2010	5	3	-	-
6/21/2010	25	17	-	-

Events

To better understand the different areas of the events section, please refer to the diagram below:

The screenshot displays the SmarterMail Enterprise 7.0 interface for the **Events** section. The **Navigation Pane** on the left shows the event configuration options. The main **Content Pane** shows the configuration form for a new event.

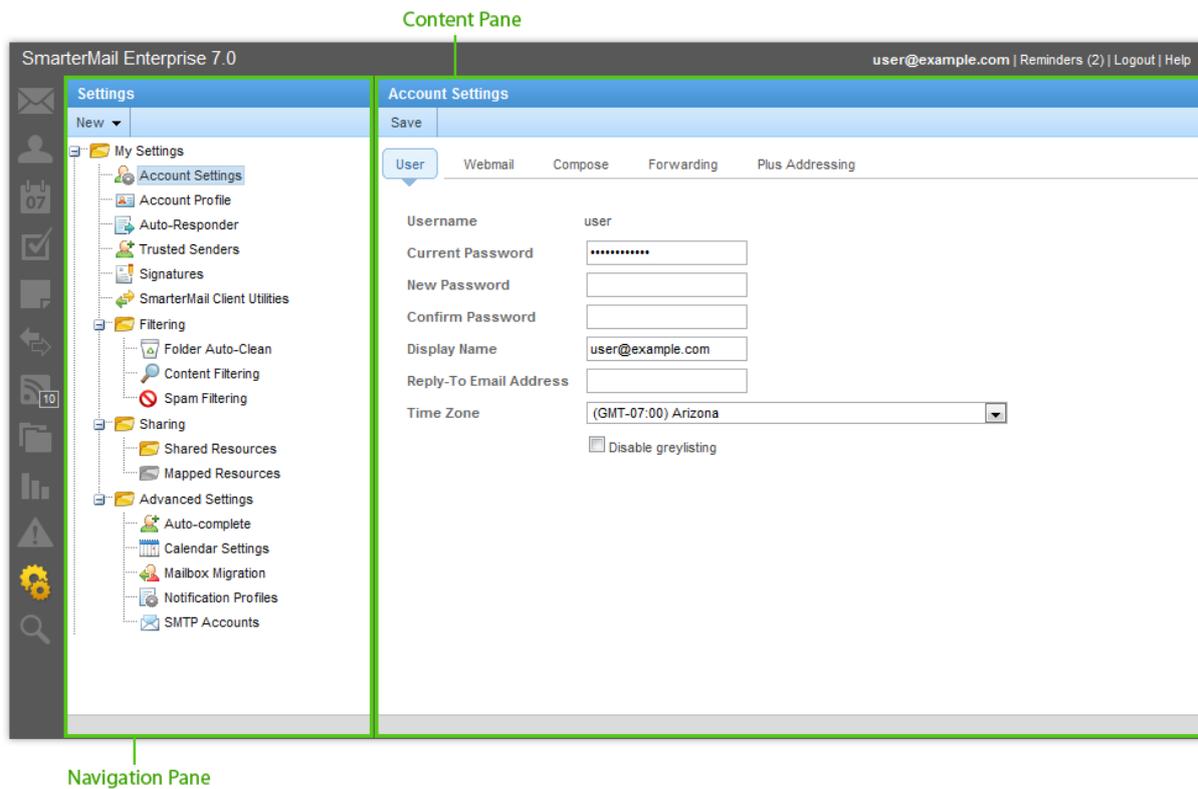
Events
 Save [Cancel]

Options Actions

Event Name: Emergency Support
 Event Group: Default Event Group
 Event Category: Email
 Event Type: Message Received
 To Address: user@example.com
 To Domain: example.com
 Time of Day: Between 9:00 AM and 3:00 PM
 From Address: Equals support@example.com
 From Domain: Equals
 Subject: Equals
 Size (KB): Equals
 Intra Domain: Equals True
 Spam Level: Equals None

Settings

To better understand the different areas of the settings section, please refer to the diagram below:



Search

To better understand the different areas of the advanced search section, please refer to the diagram below:

Search Selector

Content Pane

SmarterMail Enterprise 7.0

Search - Email

New Reset

Search Text

mary

Add Criteria

- From
- To
- Cc
- Subject
- Body
- Folder
- Email Received Before
- Email Received After

Search

Search Results

Open Delete

Email (3) Contacts (0) Appointments (0)

Subject	Folder	Date	Size
Mobile Help Desk Application	Sent Items	6/10/2010	52 KB
Sales Team Lunch	Sent Items	6/10/2010	1 KB
Smart Marketing Seminar	Sent Items	6/10/2010	1 KB

Navigation Pane

System Administrator

To better understand the different areas of the system administrator's interface, please refer to the diagram below:

Content Pane

SmarterMail Enterprise 7.0

System Administrator (admin) | Reminders | Logout | Help

Manage

New

Domains

- All Domains
- Disabled

Spool

- All Messages
- Waiting to Deliver

User Activity

- Current Connections
- Current Blocks
- Mass Messaging
- Services
- View Logs
- Indexing Status
- Message Archive Search
- Impersonate

Domains

Edit Delete Manage

Search...

Domain Name	Size	Users	Aliases	Mailing Lists
Friendlypets.com	3 MB	3	1	1
macrosans.com	5 MB	3	1	-
mactest.local	191 MB	2	-	-
mfassociates.com	10 MB	1	-	-
openinc.com	198 MB	12	3	2
radscolm.com	2 MB	3	-	-
resources.com	4 MB	8	-	-
server113.sd.com	5 MB	2	1	-
signsnowoc.com	108 MB	8	10	-
spreadusa.com	225 MB	43	3	4

10 domain(s), 85 user(s)

Navigation Pane

[Help for Users & Domain Administrators](#)

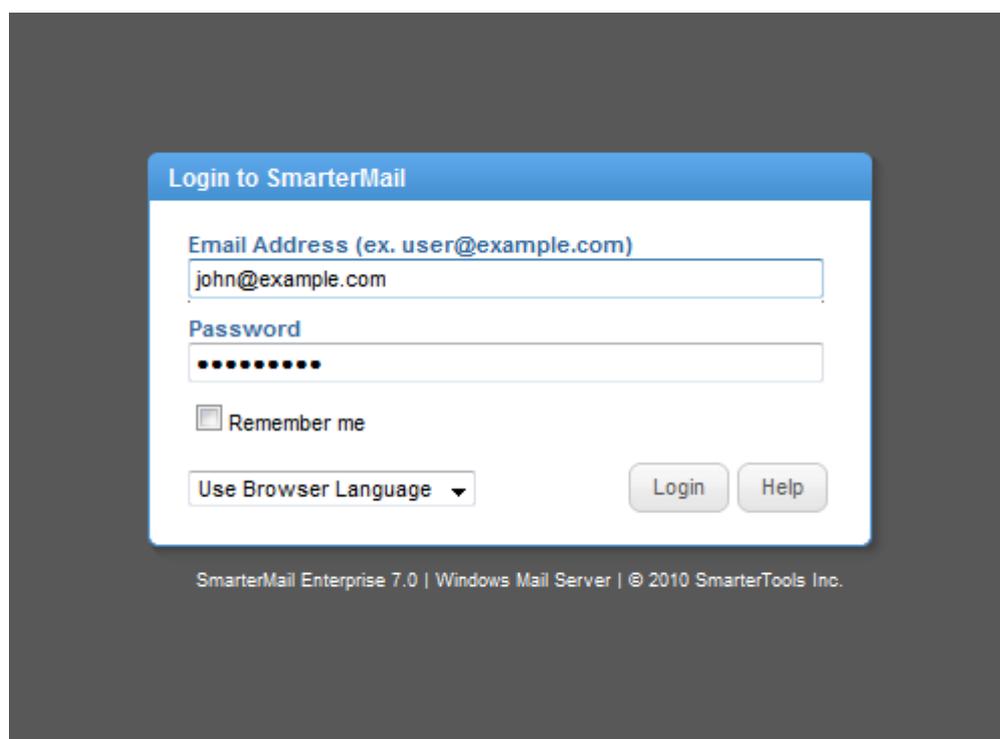
Logging in to SmarterMail

SmarterMail is a feature-rich Windows mail server that brings the power of enterprise-level features and collaboration to businesses and hosting environments. Because SmarterMail users access SmarterMail through a Webmail interface, they can login to their SmarterMail mailbox from any computer with an Internet access, anywhere in the world.

SmarterMail users will need to obtain the link to the webmail interface login page from their domain administrator or system administrator. To login to SmarterMail, type your full email address and password in the appropriate fields and click Login .

To stay logged in to SmarterMail even after closing the browser, be sure to select the Remember Me checkbox. This will allow SmarterMail to encrypt the email address and password. Note: Browser cookies must be enabled for this feature to work. In addition, SmarterTools does not recommend selecting this option if you use a public or shared computer.

You will be logged into your SmarterMail mailbox and depending on your settings, the My Today Page or your inbox will display in the content pane. If you have trouble logging in or experience issues with your email account, 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.



My Today Page

Upon logging in to SmarterMail, the My Today Page will load. This page provides is divided into five sections and gives users an at-a-glance view of their account:

- Calendar - Lists upcoming meetings and events for the week.
- Unread Messages - Lists the number of unread messages in your inbox and in your drafts and junk email folders.
- Disk Space Limits - Lists the amount of available disk space and the amount of space currently being used.
- Tasks - Lists any unfinished tasks.
- Latest RSS Items - Lists the most recent updates to the RSS feeds to which you are subscribed.

Note: Although the My Today Page is the default page upon login, users can configure SmarterMail to load their inbox upon login instead. For more information, please refer to Account Settings.

Email

Email Overview

SmarterMail users can send and receive email messages from any computer with an Internet access, anywhere in the world. To access your email, click the mail icon . Depending on your account settings your SmarterMail inbox or the My Today Page will load.

For help understanding the different areas of the inbox, see the inbox diagram .

Navigating Your Inbox

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 five 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; the envelope with a red arrow indicates a forward; and the calendar indicates a new appointment invite or appointment invite response.

- From - The sender of the email message.
- Subject - The subject of the email message.
- 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.
- Follow-up Flag - If the message is marked for follow-up, the flag icon next to the message size will be red. If the message is not marked for follow-up, the flag icon will have a gray outline.

Performing Email Actions

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Actions - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder.

In general, the following options are available from the content pane toolbar:

- New - Creates a new message.
- Mark - Click this button and select the appropriate option to mark the selected message(s) as read, unread, follow-up, no follow-up, 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.
- Follow-up - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately.
- No follow-up - Removes the selected message(s) as being marked for follow-up and changes the color of the follow-up flag appropriately.
- Spam - Marks the message as spam and moves it to the Deleted Items folder. Note: SmarterMail uses Bayesian filtering to evaluate the header and content of an incoming message and determine the probability that it is spam. This type of spam filtering "learns" to differentiate real mail from unwanted junk mail by examining the words and punctuation in large samples of both types of messages. As a result, every time a user marks a message as spam, the Bayesian filtering improves. For users with 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 - Moves the selected message(s) to any available inbox folder. Note: You can also drag-and-drop messages to an available folder.
- Delete - Click this button and select the appropriate option to delete, undelete, purge deleted messages, or delete all messages in a folder.
- Delete - Moves the selected message(s) to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Undelete - Retrieves deleted messages from your Deleted Items folder provided the system hasn't been purged yet. Note: After the system purges any items marked for deletion, you can't retrieve the deleted messages.
- Purge Marked as Deleted - Permanently deletes the messages in your Deleted Items folder. Note: This action cannot be undone.
- Delete All Messages in Folder - Moves all of the messages within a selected folder to the Deleted Items 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.
- Refresh - Manually refreshes the list of messages in the content pane.

In general, the following options are available from the preview pane toolbar:

- Reply - Addresses a response to the sender only.
- Reply All - Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
- Forward - Sends the message to someone else.
- Delete - Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Add - Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- Print - Prints the message.

Disk Space Indicator

Your system administrator may have specified limits on the amount of disk space that the email account can use. If you notice that you are close to your limit, it is recommended to permanently delete any messages that you no longer need, especially those in the Junk E-Mail, Sent Items, or Deleted Items folders. Clicking the indicator will take you directly to the disk usage report.

Reading Email Messages

SmarterMail users will know they have email waiting to be read three ways:

- The number of unread messages will display next to the name of the folder in the navigation pane.
- The status indicator of unread messages will display a yellow envelope.
- The headers of unread messages will display in bold text in the content pane.

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 the message in a separate window.

In general, the following options are available from the preview pane toolbar:

- Reply -- Addresses a response to the sender only.
- Reply All -- Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
- Forward -- Sends the message to someone else.
- Delete -- Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Add -- Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- Print -- Prints the message.

Downloading Email Attachments

If the message has an attachment, a paperclip will display in the header of the message. In addition, an attachments tab will display under the message header in the preview pane. To view the attached files in a message, click the attachments tab and double-click the appropriate file.

Changing the Message View

By default, SmarterMail displays messages in HTML format because it provides formatting and markup capabilities that are not available in plain text for emails. Generally, HTML emails are the most visual pleasing as images, colors, fonts, bulleted lists, tables, etc. are best rendered in this format.

However, there may be times when you want to view the message in another plain text format, view the raw content of the message, or analyze the header of the message. To change the message view, click the appropriate tab on the lower right corner of the message:

- HTML -- Displays the message in HTML format, which allows for colors, fonts, graphics, and other formatting.
- Text -- Displays the message in plain text, which only allows text content with no special formatting or graphics.
- Header -- 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 -- 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.

Composing Email Messages

There are several ways to compose email messages in SmarterMail, depending on whether you are writing a new message or replying to an existing message.

Creating a New Message

To create a new message, click New in the navigation pane toolbar and then click New Message . This will open a new message window that you will use to compose the email message.

The following fields will appear in the header of the message:

- To - Type the email addresses to which the message will be sent or 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. 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.
- Cc - Type the email addresses of recipients that should receive a carbon copy of the message or click Cc to select email addresses from your address book.
- Bcc - Type the email addresses of recipients that should receive a blind carbon copy of the message or click Bcc to select email addresses from your address book. 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 - Type the subject of the email.

The following options are available in the toolbar of the new message window:

- Send - Sends your message to the designated recipients.
- Save as Draft - Saves the message in its current state to the Drafts folder. This is useful if you need to continue writing the message at a later time.

- **Attach Files** - Attaches files to the message. When files are attached to an outgoing message, a file manager will display at the bottom of the new message window. The file manager will display the name, size, and upload status of the file. Note: To remove an attached file prior to sending the message, click the trash icon in the file manager.
- **Link From Storage** - Inserts a link to a file saved on the server that the recipient can use to download the file. For more information, see [File Storage Overview](#).
- **Flags** - Specifies delivery options and/or marks the message for follow-up.
- **Message Priority** - Specifies the importance of the message. By default, messages have a normal level of priority.
- **Request a Read Receipt** - Sends an email confirmation to the sender when the recipient opens the message.
- **Mark for Follow-up** - Marks the message for follow-up. For more information, see [Marking Email for Follow-ups](#).
- **Cancel** - Cancels the message and closes the new message window.

Replying to Email Messages

Alternatively, you may want to reply to the sender or to all of the recipients of a message. SmarterMail gives users two options for replying to a message:

- **Reply** - Addresses a response to the sender only.
- **Reply All** - Addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.

When replying to a message, SmarterMail automatically fills in the address fields with the email addresses of the recipients from the original message, the subject field with the subject from the original message preceded by "Re" (which means "regarding" or "in regards to"), and the text box with the text from the original message. All other message options are the same as when composing a new message.

Searching Email Messages

As time passes, finding a specific email can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find emails quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the the messages within the folder you are viewing for matches and display the results in the content pane.

To search multiple folders at once or to search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Search Overview](#) .

Deleting Email Messages

SmarterMail has two different methods for deleting messages. You can either drag and drop messages from a folder to Deleted Items or delete them using the Delete menu.

The action SmarterMail takes when you delete a message depends on the option you choose in your account settings:

- Move to Deleted Items folder - When items are deleted they are moved to the Deleted Items folder. 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 fuller than you realize.

It is important to note that the action taken for deleted items will **ONLY** be taken when deleting items through webmail. Deleting an item from Outlook Express or another email client will **NOT** use the setting that you choose. Note: When your email client connects to SmarterMail via POP3, any emails that are marked as deleted are automatically purged. To prevent this from happening, select the Move to Deleted Items folder option to avoid accidentally purging deleted items.

Undeleting Messages

Didn't mean to delete a message? You can retrieve deleted messages from your Deleted Items folder as long as the system hasn't been purged yet. Just open the Deleted Items folder and select the desired message(s). Then drag the selected message(s) to your Inbox or another folder. Note: Your system administrator can permanently remove the messages in your Deleted Items folder at any time without

warning, so don't delete messages if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted messages.

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. For more information, see [Folder Auto-clean](#) .

Marking Email for Follow-up

One method for managing email messages in SmarterMail is by flagging them. For example, if you can't respond to an important message right away, you can flag that message as soon as you read it. This allows you to easily see that the message requires follow-up action.

To flag a message, select the desired message. Then click Mark and select Follow-up in the content pane toolbar. The flag icon will turn red and the message will also appear in the follow-up view, giving you easy access to all messages that require a further action.

It should be noted that the ability to flag messages in SmarterMail is primarily intended to help users easily identify messages that need follow-up. The functionality is supported through the IMAP protocol and will sync with Outlook. Any email that is flagged in Outlook will be flagged in SmarterMail and vice versa.

Finding Flagged Messages

Although flags help messages stand out in a list, it may be difficult to find a specific flagged message if you have a lot of messages in your inbox. To quickly view all messages marked for follow-up, click the Follow-up folder in the navigation pane.

Removing a Follow-up Flag

To unmark a message for follow-up, select the desired message. Then click Mark and select No Follow-up in the content pane toolbar. The flag icon will turn white and the message will no longer appear in the follow-up view. Note: Users can also toggle the follow-up flag on and off by clicking the flag from the content pane.

Linking Email to Tasks

Because email exchanges often result in new tasks, SmarterMail includes the ability to link a message to a task.

To link a task to a message, view the desired message. Then click Add and select Add Task in the preview pane. This will open a new task window that you will use to create the task. Once the new task has been saved, a tasks tab will display under the message header in the preview pane. Clicking on this tab will allow you to see all the tasks that are linked to the message.

Finding Messages with Linked Tasks

When you link a message to a task, the message will appear in the the linked to tasks view, giving you easy access to all messages that have tasks associated to them.

Managing Email Folders

On first glance, SmarterMail users will notice that their mailbox has five special-purpose, permanent folders that can't be removed or renamed:

- **Inbox** - All incoming messages automatically go to your Inbox folder. You can read you mail in the Inbox, then delete it, move it to another folder, or leave it in the Inbox. Note: If you have set up content filtering for your mailbox, incoming messages may bypass your Inbox per your content filtering settings.
- **Deleted Items** - When you delete messages, they're moved to the Deleted Items folder. Messages in the Deleted Items folder can be deleted at any time without warning (depending on the settings set by your system administrator), so don't delete messages if you think you'll want them later. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- **Drafts** - This folder holds messages that you've composed but haven't sent yet. A message saved in your Drafts folder stays there until you either send it or delete it.
- **Junk Email** - Messages SmarterMail believes to be junk mail bypass your inbox and go to the Junk Email folder. You should periodically check this folder to ensure that valid messages were not accidentally delivered to the Junk Email folder. When valid email is delivered to the Junk Email folder, select the message. Then click Mark and select Not Spam .
- **Sent Items** - All outgoing messages are automatically saved to your Sent Items folder, making it easy to review or resend a message if necessary. Note: This folder only displays if it has been enabled in account settings. In addition, messages sent from a third-party client such as Outlook Express will not be saved in the Sent Items folder.

In addition, there are two special-purpose views that can't be removed or renamed:

- **Follow-ups** - When you mark a message for follow-up, the message appears in the follow-ups view for easy access. For more information, see [Marking Email for Follow-up](#) . Note: If you

unmark a message for follow-up, it will no longer appear in the follow-ups view.

- **Linked to Tasks** - When you link a new task to a message, the message appears in the linked to tasks view for easy access. For more information, see [Linking to Email Tasks](#) .

Creating Email Folders

To make your email easy to manage, SmarterMail lets users create as many personal mail folders as they want. Personal folders help users organize incoming and outgoing messages in ways that make sense to the individual user.

To create a new folder, click **Actions** in the navigation pane toolbar and select **New Folder** . This will open a new folder window. In the **Parent** field, select the appropriate directory to save the folder to. In the **Folder** field, type the name of the new folder. Folder names can include letters, numbers, and the hyphen (-), space (), and underline () characters only. Note: Using a backslash character (\) when naming a new folder will create a sub-folder. For example: Family\mom. Then click **Save** .

To make your SmarterMail folders available from a third-party email client such as Microsoft Outlook, you will need to create a mail account with IMPA set as your incoming mail server type. If you use POP mail, you only have access to your SmarterMail inbox, not any personal mail folders you created to organize messages.

Moving Messages to Another Folder

Moving messages between folders in SmarterMail is easy. You can either drag and drop messages from one folder to another or move them using the **Move** menu.

To move messages using the **Move** menu, first open the folder containing the message(s) you want to move. Then select the desired message(s). Click **Move** in the content pane toolbar and select the name of the destination folder. The message(s) will automatically move into the folder you selected.

Renaming and Deleting Folders

You can change the name of a personal mail folder anytime or delete it completely when you no longer need it.

To rename a folder, select the appropriate folder in the navigation pane. Click **Actions** in the navigation pane toolbar and select **Rename Folder** . In the **New Folder Name** field, type the name of the new field. You can also change the directory that the folder is saved to by selecting another directory in the **Parent** field. Then click **Save** .

To delete a folder, select the appropriate folder in the navigation pane. Click **Actions** in the navigation pane toolbar and select **Delete Folder** . Then click **OK** to delete the folder and all of its contents.

Message Archive Search

This feature is only available to domain and system administrators using SmarterMail Enterprise.

Message archiving is a method of storing all email traffic for a domain in a separate location on the mail server. Typically, this is a feature used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002.

To search the archive, click the manage icon and click Message Archive Search in the navigation pane. System administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

Domain administrators can also search the archive by clicking email icon and clicking Message Archive Search in the navigation pane.

For more information on archiving, see [Message Archiving](#) .

Contacts

Contacts Overview

SmarterMail's contacts feature is an online contact manager that helps users organize and communicate with the people in their life. Users can view and manage their contacts from any computer with an Internet access, anywhere in the world.

To access your contacts, click the contacts icon . By default, the contacts in My Contacts will load.

Note: To view different contacts lists (such as the Global Address List, shared lists, or mapped resources), click the Contacts menu at the top of the navigation pane and select the desired list.

For help understanding the different areas of the contacts section, see the [contacts diagram](#) .

Navigating Your Contacts

When you view your SmarterMail contacts, the page is divided into three sections:

- The navigation pane displays the contacts in the list you are viewing. To view details for a specific contact, simply click the desired contact.
- The content pane displays all available details about the selected contact.
- The preview pane displays a list of the most recent messages, appointments, and attachments related to the selected contact.

In general, the following options are available from the navigation pane toolbar:

- **New** - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- **Actions** - Click this button and select the appropriate option to delete contacts, send email to contacts, import/export contacts, or add the contacts to Outlook.
- **Select All** - Selects all contacts in the list you are viewing.
- **Delete** - Deletes the selected contact(s).
- **Send Email** - Addresses an email message to the selected contact(s).
- **Add to Outlook** - Connects SmarterMail to Microsoft Outlook and synchronizes contact information. Note: This feature is only available in SmarterMail Enterprise.
- **Import/Export** - Import or export some or all of your contacts in .vcf format. For more information, see [Importing and Exporting Contacts](#) .
- **View** - Click this button and select the appropriate option do filter contacts by category, sort contacts, or choose the details that are displayed about a contact in the navigation pane.
- **Filter** - Filters contacts by the selected category.
- **Sort** - Sorts contacts by display name, email, or company in ascending or descending order.
- **Visible Fields** - Choose which contact details are displayed in the navigation pane.

In general, the following options are available from the content pane toolbar:

- **Edit** - Edits the selected contact.
- **Delete** - Deletes the selected contact.
- **Download vCard** - Saves the contact information as an electronic business card, which can later be imported to another program such as Outlook or sent through email as an attachment.

Viewing Items Related to a Contact

To help users better understand their relationships and communications with each contact, SmarterMail automatically displays a list of recent messages, appointments, and attachments related to contacts. This information can be found in the related items grid in the preview pane.

In general, the following options are available from the preview pane toolbar:

- **Open** - Opens the selected message, appointment, or attachment related to the contact.
- **Edit** - Edits the selected appointment related to the contact.
- **Delete** - Deletes the selected message, appointment, or attachment related to the contact.

To perform a basic search of the related items listed for a contact, type the search criteria in the search bar located near the top of the preview pane. Then click the magnifying glass or press Enter on your

keyboard. SmarterMail will automatically search the related items for matches and display the results in the related items grid.

Creating New Contacts

There are several ways to add new contacts to SmarterMail, depending on whether you want to add a contact from an email message, import contacts from another provider, or add a contact by typing the name and other information directly in SmarterMail.

To add a contact from an incoming email message, view the desired message in the preview pane. Then click the From field in the header of the message. The sender's email address and a link to add the sender to your contacts list will display. Click the link to open a new contact window. SmarterMail will automatically complete the display name and email address fields, but you can enter additional details and save the contact.

To add a contact by typing the name and other information directly in SmarterMail, click New in the navigation pane toolbar and then click New Contact . This will open a new contact window that you will use to add the contact to SmarterMail.

For information on adding new contacts by importing contacts from another email service, see [Importing and Exporting Contacts](#) .

Saving Contact Details

When you add a new contact to SmarterMail, you can save as much or as few details about the person as you like. In general, contact details are divided into five sections:

- **Personal Info** - Type the contact's display name, title, first name, middle name, last name, suffix, email address, instant messenger, home page, and date of birth. Note: The display name is the only required field to save a contact.
- **Contact Info** - Type the contact's home phone number, work phone number, mobile phone number, pager number, home and work fax numbers, and home address.
- **Work Info** - Type the contact's company name, job title, department, office, work address, and website URL.
- **Additional Info** - Type any additional details about the contact.
- **Categories** - A category provides a way to organize your contacts into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

Searching Contacts

If you have a large number of people in your contacts list, finding a specific contact can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find contacts quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the the contacts list you are viewing for matches and display the results in the navigation pane.

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Search Overview](#) .

Importing and Exporting Contacts

Because people often have multiple email accounts from different providers, SmarterMail makes it easy for users to securely transfer contacts to and from other online address books.

Importing Contacts to SmarterMail

SmarterMail supports importing contacts from two different types of files: vCards (.vcf) and comma-separated text files (.csv). SmarterMail also supports importing from a .zip file containing any combination of these files. For step-by-step instructions on importing contacts to SmarterMail, please refer to the KB article [How To - Import Contacts to SmarterMail](#) .

Exporting Contacts from SmarterMail

Contacts are downloaded as a .zip file containing vCard files. These files can then be imported into Microsoft Outlook or into another SmarterMail account. For step-by-step instructions on exporting contacts from SmarterMail, please refer to the KB article [How To - Export SmarterMail Contacts](#) .

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 icon . Then expand the My Settings folder and click Account Profile in the navigation pane.

Note: If the Global Address List is enabled for your domain, 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

SmarterMail's calendar feature takes the burden out of organizing your schedule and is accessible from any device with Internet access. SmarterMail's calendar system is very flexible and includes many options that make it easy to keep track of important events, including:

- 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 access your calendar, click the calendar icon . Depending on your account settings, the daily, weekly, monthly, or all appointments calendar view will load. Note: To view different calendars (such as shared calendars or mapped resources), click the Calendars menu at the top of the content pane and select the desired calendar.

For help understanding the different areas of the calendar, see the calendar diagram .

Navigating Your Calendar

When you view your SmarterMail calendar, you can toggle between four different views:

- Daily - The daily view is a planner-type view that displays all appointments scheduled for the day. If configured, this view also displays the weather forecast for the date you are viewing and any applicable start or due times for tasks.
- Weekly - The weekly view is intended as more of an agenda-type view and displays all appointments scheduled for the week. If configured, this view also displays the 7-day weather forecast and the start and due dates for tasks.
- Monthly - The monthly view displays all appointments and tasks scheduled for the month. It serves as an at-a-glance type of calendar that outlines a general idea of the upcoming events over the next 30 days.

- All Appointments - The all appointments view lists all appointments on your calendar and can be sorted by the appointment subject, start date, or end date.

In general, the following options are available:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Actions - Click this button and select the appropriate option to edit an appointment, delete an appointment, or import all calendar appointments to Microsoft Outlook. Note: The ability to add your calendar to Outlook is only available in SmarterMail Enterprise and SmarterMail Free editions.
- View - Click this button and select the appropriate option to filter calendar items by category or choose the details that are displayed about an appointment in the calendar view.
- Filter - Filters appointments by the selected category or whether they are recurring or all day.
- Visible Fields - Choose which appointment details are displayed on the calendar.
- Print - Prints the data displayed in the current calendar view.

Creating New Calendar Appointments

To create a new calendar appointment, click New in the navigation pane toolbar and then click New Appointment . This will open a new appointment window that you will use to add the appointment to SmarterMail and to invite attendees.

Saving Appointment Details

When you add a new appointment to your calendar, you can save as much or as few details about the appointment as you like. In general, appointment details are divided into four sections:

- Appointment - Type the subject of the appointment and specify the attendees, the appointment's start date and time, end date and time, and location. You can also specify your availability (free or busy) and configure a reminder that will display in webmail prior to the appointment time, in addition to an email reminder. Note: The subject and start date are the only required fields to save an appointment.
- Recurrence Information - Use this section to indicate that the appointment occurs on a regular basis. Recurring events may include personal occasions (birthdays, anniversaries, etc.), holidays, and regular meetings or business appointments. The recurrence feature is very flexible and can be as simple or as complex as necessary. Examples include a birthday that occurs every August 7th, a meeting that happens the second Monday of every month, or an appointment that

occurs every four days for three weeks.

- Description - Type any important notes or a description of the appointment, if desired.
- Categories - A category provides a way to organize your appointments into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

Once the appointment is saved, attendees will receive an email appointment invitation and the appointment will appear on your calendar. When attendees accept or decline the appointment, you will also receive a notification email.

Checking the Availability of Attendees

SmarterMail Enterprise users can check the availability of attendees prior to saving an appointment. This allows you to determine if there is a scheduling conflict and adjust the planned appointment time accordingly. To check the availability of attendees, click the availability icon next to the Attendees field in the new appointment window.

Appointment Invitations

Once the appointment is saved, attendees will receive an email appointment invitation and the appointment will appear on your calendar. If they are viewing the appointment invitation from their SmarterMail webmail, they can click the Check Availability button to view their availability in a popup window.

Managing Calendar Appointments

To view the details of an appointment, click on the appointment from any calendar view. The appointment details will load in a popup window.

Editing Appointment Details

To edit the details of an appointment, click on the appointment from any calendar view. The appointment details will load in a popup window. Make the appropriate changes and click Save . The appointment details will update on your calendar and any attendees will receive a new invitation notifying them of the change. Note: Editing a recurring appointment will update all instances of the appointment on your calendar. There is no way to edit a single date of a recurring appointment series.

Deleting an Appointment

On occasion, you may need to delete a calendar appointment. To delete and remove an appointment from your calendar, click on the appointment from any calendar view. The appointment details will load in a popup window. Click Delete . The appointment will not longer appear on your calendar and

any attendees will receive a notification that the appointment has been cancelled. Note: Deleting a recurring appointment will delete all instances of the appointment from your calendar.

Tasks

Tasks Overview

SmarterMail's tasks feature is designed to help users keep track of things they need to do. Users can create lists of items, set due dates, and even link email messages to tasks.

To access your tasks, click the tasks icon . By default, the tasks in My Tasks will load. Note: To view different task lists (such as shared lists or mapped resources), click the Tasks menu at the top of the navigation pane and select the desired list.

For help understanding the different areas of the tasks section, see the tasks diagram .

Navigating Your Tasks

When you view your tasks, the page is divided into two sections:

- The navigation pane displays the tasks in the list you are viewing. To view details for a specific task, simply click the desired task.
- The content pane displays all available details about the selected task.

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Actions - Click this button and select the appropriate option to select all tasks, delete tasks, or add the tasks to Outlook.
- Select All - Selects all tasks in the list you are viewing.
- Delete - Deletes the selected task(s).
- Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes task information. Note: This feature is only available in SmarterMail Enterprise.
- View - Click this button and select the appropriate option to filter tasks, sort tasks, or choose the details that are displayed about a task in the navigation pane.
- Filter - Filters tasks by the selected category or by whether the task is completed.
- Sort - Sorts tasks by subject, due date, percentage complete, or priority level in ascending or descending order.
- Visible Fields - Choose which task details are displayed in the navigation pane.

In general, the following options are available from the content pane toolbar:

- Edit - Edits the selected task.
- Delete - Deletes the selected task.

Creating New Tasks

To create a new task, click New in the navigation pane toolbar and then click New Task . This will open a new task window that you will use to add the task to SmarterMail.

- Save - Saves the task details.
- Master Categories - A category provides a way to organize your tasks into manageable groups. To add a category, simply click the Master Categories button and type the new category name.

Note: Be sure to separate categories with a comma. --%>

Saving Task Details

When you add a new task in SmarterMail, you can save as much or as few details about the task as you like. In general, task details are divided into three sections:

- Details - Type the subject of the task and specify the task's start date and time, due date and time, priority level, status, and the percentage of the task that is completed. You can also configure a reminder that will display in webmail prior to due date and time. Note: The subject, start date and due date are the only required fields to save a task.
 - Description - Type any important notes or a description of the task, if desired.
 - Categories - A category provides a way to organize your notes into manageable groups. To add a category, simply click the Master Categories button and type the new category name.
- Note: Be sure to separate categories with a comma.

Once the task is saved, it will appear on your calendar. Note: Users can disable the display of task start and end times on the calendar. For more information, see [Calendar Settings](#).

- Subject - The name of the appointment. Make sure the subject is descriptive, as it will display on task reminders and on your calendar.
- 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.
- Start - Type the task's start date and time or use the calendar and clock icons to select the date and time.
- Due - Type the task's due date and time or use the calendar and clock icons to select the date and time.
- Reminder - To receive a reminder prior to the due date, select the appropriate option from the

list. By default, the reminder will appear as a popup in the SmarterMail interface, so if you are not logged in to webmail, you will not receive the reminder.

- Priority - Select the priority level of the task from the list. Higher priority tasks are considered more important.
- Status - Select the status of the task.
- % Complete - The percentage of the task that is completed.

Description

Use this tab to record any important notes or a description of the task, if desired.

Categories

A category provides a way to organize your tasks into manageable groups. Use this tab to assign the task to a category, if desired. --%>

Searching Tasks

If you have a large number of tasks in your tasks list, finding a specific task can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find tasks quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the navigation pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the tasks list you are viewing for matches and display the results in the navigation pane.

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Search Overview](#) .

Notes

Notes Overview

SmarterMail's notes feature provides users with the the electronic equivalent of paper sticky notes. Use notes to jot down questions, ideas, reminders, and anything you would write on note paper. This feature is especially convenient when used to save bits of information you may need later, such as directions or text you want to reuse in other items or documents.

To access your notes, click the notes icon . By default, the notes in My Notes will load. Note: To view different task lists (such as shared lists or mapped resources), click the Notes menu at the top of the navigation pane and select the desired list.

Navigating Your Notes

When you view your notes, the page is divided into two sections:

- The navigation pane displays the notes in the list you are viewing. To view details for a specific note, simply click the desired note.
- The content pane displays all available details about the selected note.

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Actions - Click this button and select the appropriate option to select all notes or delete notes.
- Select All - Selects all notes in the list you are viewing.
- Delete - Deletes the selected note(s).
- View - Click this button and select the appropriate option to filter notes, sort notes, or choose the details that are displayed about a note in the navigation pane.
- Filter - Filters notes by the selected category or color.
- Sort - Sorts notes by text, color, or date in ascending or descending order.
- Visible Fields - Choose which note details are displayed in the navigation pane.

In general, the following options are available from the content pane toolbar:

- Edit - Edits the selected note.
- Delete - Deletes the selected note.

Creating New Notes

To create a new note, click New in the navigation pane toolbar and then click New Note . This will open a new note window that you will use to add the note to SmarterMail.

Saving Note Details

When you add a new task in SmarterMail, you can save as much or as few details about the note as you like. In general, task details are divided into two sections:

- Details - Type the text of the note and specify the color of the note. Note: The color and text of the note are the only required fields to save a note.
- Categories - A category provides a way to organize your notes into manageable groups. To add a category, simply click the Master Categories button and type the new category name. Note: Be sure to separate categories with a comma.

Searching Notes

If you have a large number of notes in your notes list, finding a specific notes can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find notes quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the navigation pane. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the notes list you are viewing for matches and display the results in the navigation pane.

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Search Overview](#) .

Synchronization Center

Synchronization Center Overview

SmarterMail's synchronization center is designed to help users understand how they can sync their mobile devices, desktops, and third-party email clients with their SmarterMail mailbox. To access the synchronization center, click the synchronization center icon.

Navigating the Synchronization Center

When you view the synchronization center, the window is divided into three sections:

- **Mobile** - Lists mobile devices that can be synced with SmarterMail. Clicking on a specific device will display a description of the device, the available methods for syncing the device with SmarterMail, and the collaboration items that can be synced using each method.
- **Desktop** - Lists desktop devices and applications that can be synced with SmarterMail. Clicking on a specific device will display a description of the device, the available methods for syncing the device with SmarterMail, and the collaboration items that can be synced using each method.
- **Active** - Lists all previous sync connections with SmarterMail via the Exchange ActiveSync, SyncML, and Add to Outlook synchronization methods.

To edit or delete an active sync connection, click the Active tab and click the appropriate button in the lower right corner of the synchronization center window. Note: In general, users should not delete a sync connection, as this may cause the device to stop functioning with SmarterMail. Deleting a connection is only recommended if you are experiencing issues and want to completely re-configure the device's connection to SmarterMail.

Synchronization Methods

SmarterMail Enterprise 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.
- SyncML is a platform-independent information synchronization standard that syncs SmarterMail mailboxes with Outlook, Thunderbird, and most smartphones.
- CalDAV is an extension of the WebDAV protocol that syncs SmarterMail calendars with Macs, iPads, iPhones, and other devices/applications that use the technology.
- CardDAV is an extension of the WebDAV protocol that syncs SmarterMail contacts with Macs, iPads, iPhones, Thunderbird and other devices/applications that use the technology.
- The Add to Outlook feature within the SmarterMail Webmail interface uses two-way synchronization technology to sync a SmarterMail mailbox with Outlook 2007 or higher and provides read-only capability for Outlook 2003.
- SmarterMail Sync is a desktop utility that syncs SmarterMail mailboxes with Outlook and Windows Mobile devices.

For more information regarding the different synchronization methods available for SmarterMail, please refer to the Synchronizing with SmarterMail document on the SmarterMail Resources page of the SmarterTools website.

RSS Feeds

RSS Feeds Overview

SmarterMail's built-in RSS feed reader makes keeping up with your favorite websites as easy as checking your email. Instead of checking a site repeatedly for updates, RSS feeds allow people to automatically be notified when a website contains new posts or entries.

To access your RSS feeds, click the RSS feeds icon .

For help understanding the different areas of the RSS feeds section, see the RSS feeds diagram .

Navigating Your RSS Feeds

When you view your RSS feeds, the page is divided into two sections:

- The navigation pane displays all of the RSS feeds you have added to SmarterMail. To view

recent updates to a specific RSS feed, simply click the desired feed.

- The content pane displays the RSS feeds in the folder you are viewing.

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Actions - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder.

In general, the following options are available from the content pane toolbar:

- New - Adds a new RSS feed to SmarterMail.
- Edit - Edits the selected RSS feed.
- Delete - Deletes the selected RSS feed(s).

Adding New RSS Feeds

Websites publish lists of updates, called "feeds," that indicate when new content has been posted. When you add a new feed to SmarterMail (also called subscribing to a feed), SmarterMail starts monitoring that feed for updates. New content posted to your feeds will appear in the RSS feeds section of your mailbox, allowing you to keep up with your favorites websites without having to visit each one individually.

To subscribe to a new RSS feed, click New in the content pane toolbar. Adding a feed requires two pieces of information:

- Name - A friendly name for the RSS 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 URL for the website's RSS feed. Note: The RSS feed URL is not the same as the website URL. For example, the SmarterTools Blog can be found at blog.smartertools.com , but the RSS feed for the blog is at blog.smartertools.com/rss.aspx .

Finding a Site's RSS Feed

An RSS feed can usually be identified by an orange symbol. When you see it on a website, clicking will usually direct you to that site's feed. From there, you can either copy and paste the link to subscribe to the feed in SmarterMail. If the site does not have the orange RSS feed symbol, try looking for a text link to the RSS feed. Text links to feeds may include any of the following terms: subscribe, syndicate, feed, RSS, xml, or atom. Note: Not all sites offer RSS feeds.

For a list of sample RSS feeds you may be interested in subscribing to, please see [Sample Feeds](#) .

Sample Feeds

There are many RSS feeds on the internet today. This topic contains many of the more common feeds, although this list is by no means exhaustive.

The following links are either direct RSS feed URLs or links to web pages containing an RSS feed list. To add a feed to SmarterMail, right-click on the link and select "copy shortcut" from the context menu. Then paste this value into the RSS URL in SmarterMail.

Feed lists (designated by [feed-list]) will typically have orange XML icons next to each feed. Follow the same procedure (copy shortcut) to get the URL of those feeds.

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

To make your RSS feeds easy to manage, SmarterMail lets users create as many RSS folders as they want. RSS folders help users organize feeds in ways that make sense to the individual user.

To create a new folder, click Actions in the navigation pane toolbar and select New Folder . This will open a new folder window. In the Parent field, select the appropriate directory to save the folder to. In the Folder field, type the name of the new folder. Folder names can include letters, numbers, and the hyphen (-), space (), and underline (_) characters only. Note: Using a backslash character (\) when naming a new folder will create a sub-folder. For example: Technology\Software. Then click Save .

Renaming and Deleting Folders

You can change the name of a RSS folder anytime or delete it completely when you no longer need it.

To rename a folder, select the appropriate folder in the navigation pane. Click Actions in the navigation pane toolbar and select Rename Folder . In the New Folder Name field, type the name of the new field. You can also change the directory that the folder is saved to by selecting another directory in the Parent field. Then click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click Actions in the navigation pane toolbar and select Delete Folder . Then click OK to delete the folder and all of its contents.

File Storage

File Storage Overview

SmarterMail's file storage feature allows users to upload files to the server and share them via public links. One benefit of using file storage is that it reduces the stress on the server by keeping large files out of the spool. Note: Files uploaded to the server are counted toward the user's disk space allocation, so users are encouraged to delete files that are no longer used from the server when possible.

To access the file storage area, click the file storage icon . A list of files uploaded to the server will load in the content pane and the following options will be available in the content pane toolbar:

- Edit - Edits the sharing settings for the selected file.
- Delete - Permanently removes the selected file(s) from the server.
- Upload - Uploads a new file to the server.
- Downloads - Downloads the selected file(s).

For help understanding the different areas of the file storage section, see the file storage diagram .

Sharing Uploaded Files

After uploading a file to the server, you will need to edit the file sharing settings by selecting the file and clicking Edit in the content pane toolbar. The file sharing settings will load and the following options will be available:

- Filename - The name of the file.
- Link Expires - The date and time that the public link to download the file expires. If this field is not completed, the link will never expire.
- Enabled - Select this option to enable the link expiration date.
- Access Password - The password used to download the file. If this field is not completed, no password is needed to download the file via the public link.
- Enabled - Select this option to make the file password protected.
- Enable public access - Select this option to make the file available for sharing via a public link.

When you share a file by inserting the public link to the file into an email message, the recipient will be directed to a file storage download page with instructions on how to download the file.

Reports

Reports Overview

The practice of routinely generating and evaluating reports provides users, domain administrators, and system administrators with the information they need to uncover problems and establish policies.

Summary and Trend Reports

SmarterMail includes dozens of predefined summary and trend reports:

- 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.).

These reports can be grouped and filtered to create custom reports. With summary, trend, and custom reporting, SmarterMail provides domain and system administrators with the information they need to

efficiently monitor the performance of their mail server software. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

For help understanding the different areas of the reporting section, see the reports diagram .

Favorites

Users, domain administrators, and system administrators can mark any report as a favorite, allowing easy access to the most frequently used reports. Using favorites can greatly reduce your time analyzing the performance of the mail server, as you can quickly jump between reports that interest you.

To access your favorite reports, click the reports icon . Then expand Favorites in the navigation pane and select the desired report. The report will load in the content pane and the following options will be available in the content pane toolbar:

- Email - Click this button to email a copy of the report to the desired recipient(s).
- Export - Click this button to export the report in CSV or TAB format.
- Delete - Click this button to permanently remove the report from the favorites list.
- Set Dates - Click this button to specify the timeline the report covers.
- Print - Click this button to print the report.

Scheduled Email Reports

The Enterprise and Free editions of SmarterMail have the ability to email standard and custom reports on a daily, weekly, and monthly basis.

- Daily email reports are sent after 12:00 AM.
- Weekly email reports are sent after 12:00 AM Sunday.
- Monthly email reports are sent after 12:00 AM on the first day of the month.

The reports are generated and sent by SmarterMail according to the time zone configured for that particular user.

To see which reports are scheduled to be emailed, click the reports icon . Then click Scheduled Email Reports in the navigation pane and select the desired report. A list of scheduled email reports will load in the content pane and the following options will be available in the content pane toolbar:

- New -
- Send Now - Click this button to email a copy of the report to the desired recipient(s).
- Edit - Click this button to edit the email options for the report.
- Delete - Click this button to permanently remove the report from the emailed reports list.

Custom Reports

With custom reports, statistics from multiple reports can be combined to give administrators and users a comprehensive analysis of the mail server's performance.

To access custom reports, click the reporting icon . Then expand the Custom Reports folder in the left tree view and select the desired report. The report will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new custom report.
- Edit - Edit the report's settings and configuration options.
- Delete - Permanently remove the report from the custom reports list.

Creating a Custom Report

To create custom report, click the reporting icon . Then expand the Custom Reports folder in the left tree view and click Manage Custom Reports . The following configuration tabs will be available:

Custom Report

Use this tab to specify the following options:

- Name - The name of the custom report.
- Default Date Range - The default time period from which report data is collected.

Report Items

Use this tab to specify which report items to include in the custom report:

- Report Items - The specific report to be added to the custom report. Note: Depending on the report item selected, some of the options listed below may not be available.
- Name - The name of the report item.
- Rows - The number of rows displayed in the report.
- Sort By - The sort order of the data.
- Chart - To specify a specific chart type, select the appropriate option from the list.
- Values - The values that will be charted.
- Group By - The timeframe for which rows are grouped.

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.

The following report items are available:

- Disk Usage - The number of MB that each folder is occupying on the server.
- Rank - The order users or domains are listed within the report.
- User - The specific user on the domain.

File Storage Disk Usage

This report informs users how much disk space is currently being used for file storage. 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:

- Disk Usage - The number of MB that each folder is occupying on the server.
- Rank - The folders are listed within the report.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Incoming Messages - The total number of messages the account has received.
- Incoming Spam Messages - The total number of spam messages delivered to the mailbox.
- Outgoing Messages - The total number of messages the account has sent.
- Outgoing Spam Messages - The total number of spam messages sent from the account.

- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Data Received - The total size in KB of all data received by the account.
- Data Size - The total size in KB of all data sent by the account.
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Rank - The order in which users or domains are listed within the report.
- Terminations - The total number of terminations that occurred for incoming mail.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bad Commands - The total number of bad commands given.
- Rank - The order in which users or domains are listed within the report.
- Terminations - The total number of terminations that occurred for incoming mail.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Rank - The order in which users or domains are listed within the report.
- Terminations - The total number of terminations that occurred for incoming mail.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Rank - The order in which users or domains are listed within the report.
- Terminations - The total number of terminations that occurred for incoming mail.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Messages Trusted - The total number of messages received from addresses in the trusted senders list.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- High Spam Messages - The total number of messages received with a high spam tolerance level.
- Medium Spam Messages - The total number of messages received with a medium spam

tolerance level.

- Rank - The order in which users or domains are listed within the report.
- Total Spam Messages - The total number of messages received with any spam tolerance level assigned to it.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Blocked Messages - The total number of messages that were sent and blocked as spam.
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Allowed Connections - The total number of messages that passed greylisting and were delivered to the mailbox.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Delayed Connections - The total number of messages that were delayed due to greylisting.
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.

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 following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Rank - The order in which users or domains are listed within the report.
- User - The specific user on the domain.
- Viruses - The total number of viruses detected from incoming mail.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by SmarterMail.
- Avg. CPU - The average CPU usage percentage for the SmarterMail process.
- Avg. Memory - The average memory usage for the SmarterMail process.
- Avg. Spool Count - The average number of messages in the spool.
- Avg. Threads - The average number of threads used for the SmarterMail process..

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.

The following report items are available:

- Account Type - The type of account the email address is associated with (user, domain administrator, or system administrator).
- Incoming Messages - The total number of messages the account has received.
- Incoming Spam Messages - The total number of spam messages delivered to the mailbox.
- Outgoing Messages - The total number of messages the account has sent.
- Outgoing Spam Messages - The total number of spam messages sent from the account.

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.

The following report items are available:

- Data Received - The total size in KB of all data received by the account.
- Data Size - The total size in KB of all data sent by the account.
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Blocked Connections - The total number of connections that were blocked.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Day - The specified amount of time that the report data falls within.
- Terminations - The total number of terminations that occurred for incoming mail.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Bad Commands - The total number of bad commands given.
- Day - The specified amount of time that the report data falls within.
- Terminations - The total number of terminations that occurred for incoming mail.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Blocked Connections - The total number of connections that were blocked.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Day - The specified amount of time that the report data falls within.
- Terminations - The total number of terminations that occurred for incoming mail.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Bandwidth - The bandwidth in KB for all incoming SMTP mail.
- Blocked Connections - The total number of connections that were blocked.
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Bad Commands - The total number of bad commands given.
- Blocked Connections - The total number of connections that were blocked.
- Day - The specified amount of time that the report data falls within.
- Terminations - The total number of terminations that occurred for incoming mail.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.
- Failed Connections - The total number of connections that failed.

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.

The following report items are available:

- Avg. Active Connections - The average number of active connections made by Smartermail.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.
- Failed Connections - The total number of connections that failed.

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.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- High Spam Messages - The total number of messages received with a high spam tolerance level.
- Medium Spam Messages - The total number of messages received with a medium spam tolerance level.
- Rank - The order in which users or domains are listed within the report.
- Total Spam Messages - The total number of messages received with any spam tolerance level assigned to it.

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.

The following report items are available:

- Blocked Messages - The total number of messages that were sent and blocked as spam.
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Day - The specified amount of time that the report data falls within.
- High Spam Messages - The total number of messages received with a high spam tolerance level.

- Medium Spam Messages - The total number of messages received with a medium spam tolerance level.
- Rank - The order in which users or domains are listed within the report.
- Total Spam Messages - The total number of messages received with any spam tolerance level assigned to it.

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.

The following report items are available:

- Blocked Messages - The total number of messages that were sent and blocked as spam.
- Day - The specified amount of time that the report data falls within.

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.

The following report items are available:

- Allowed Connections - The total number of messages that passed greylisting and were delivered to the mailbox.
- Connections - The total number of connections made to a particular server (i.e., SMTP, POP, IMAP, etc.)
- Day - The specified amount of time that the report data falls within.
- Delayed Connections - The total number of messages that were delayed due to greylisting.

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 following report items are available:

- Day - The specified amount of time that the report data falls within.
- Viruses - The total number of viruses that were detected from incoming mail.

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.

Events

Events Overview

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. With notifications, system administrators don't have to query for the status of the items in the system--they just receive messages when specific events occur so they can take care of them.

There are two categories of events in SmarterMail: user-level events and system-level events:

- User-level events are specific to each user.
- System-level events can only be set by system administrators.

To view events, click the events icon and then click All Events in the left tree view. Events can also be viewed by event group or category (collaboration, email, domain, etc.). Any configured events will load in the content pane. Note: Only system administrators can access system-level events.

In general, the following columns are available:

- Checkbox - Use these boxes to select multiple events. Events must be selected before choosing an action from the content pane toolbar.
- Name - The name of the event.
- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - The event that triggers the action.
- Conditions - The criteria the event must meet to trigger the action.
- Actions - The actions that occur when an event is triggered.

The following actions are available from the content pane toolbar:

- New - Creates a new event.
- Edit - Allows the user/system administrator to make changes to an event's settings.
- Delete - Permanently deletes the selected event(s).
- Search - Allows the user/system administrator to search for a specific event.

To view the settings for a specific event, simply double-click the event and the event settings will load in the content pane.

Creating New Events

To add a new event, click the events icon and click All Events in the left tree view. Then click New in the content pane toolbar. The new event settings will load in the content pane.

Saving Event Details

When you add a new event, event details are divided into two sections: options and actions.

Options

Use this section to specify the following event options:

- Name - The name of the event.
- Event Group - The folder in which to store/associate your event subscriptions

- Event Category - The feature to which the event pertains (collaboration, email, security, etc.)
- Event Type - The event that triggers the action.

Depending on the event category and type selected, different event action criteria will be available.

For more information on the various event action criterions, see the corresponding event category page of the online help.

Actions

Use this section to specify the following event actions:

- Action - The actions that occur when an event is triggered (or how the system notifies you).
- Maximum Frequency - To specify how frequently the action is performed, select the appropriate option from the list.
- Notification Profile - To specify which notification profile to use, select the appropriate option from the list.
- From Address - The email address the system uses to send the event notification

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

Additional fields may be available depending on the event category chosen.

Click the Save button in the actions popup window and then click Save in the content pane toolbar to save that event.

Notification Profiles

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

To view a list of current notification profiles, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Notification Profiles . Your notification profiles will load in the content pane.

The following columns are available:

- Checkbox - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- Notification Profile Name - The name of the profile.
- Type - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- New - Creates a new notification profile.
- Edit - Edits an existing notification profile.
- Delete - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- Notification Profile Name - The name of the profile.
- Email Address(es) - The email address(es) to which notifications are sent.
- Enable - Checking this box will enable email notifications.
- SMS Email Address(es) - The mobile device email address to which notifications are sent.
- Enable - Checking this box will enable SMS notifications.
- Enable Reminders - Checking this box will display reminders for tasks and appointments in a popup window in webmail.

Event Categories

Alias Events

System administrators can receive notifications based on the following alias events:

- Alias Added - Notifies system administrators when a user creates a new email alias.
- Alias Deleted - Notifies system administrators when a user deletes an existing email alias.

Depending on the event selected, the following event criteria are available:

- Alias Addresses - The alias address that will trigger the event.
- Alias Name - The alias name that will trigger the event.
- Domain - The domain on which the event occurs.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

Collaboration Events

Users and system administrators can receive notifications based on the following collaboration events:

- Calendar Reminder Occured - Notifies users that there is an upcoming appointment.
- Task Reminder Occured - Notifies users that a task deadline is approaching.

Depending on the event selected, the following event criteria are available:

- Email Address - The email address that will trigger the event.
- Description - The words that will trigger the event if found within the appointment or task description.
- Domain - The domain on which the event occurs.
- Location - The appointment location that will trigger the event.
- Subject - The words that will trigger the event if found within the appointment or task subject.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use default notification profile for user
- Use my notification profile

Domain Events

System administrators can receive notifications based on the following domain events:

- Domain Added - Notifies system administrators when a new domain is added to the server.
- Domain Deleted - Notifies system administrators when an existing domain is deleted from the server.
- Domain Disk Space Used - Notifies system administrators when a domain's disk space usage reaches a certain threshold.

Depending on the event selected, the following event criteria are available:

- Domain - The domain on which the event occurs.
- Domain Usage (%) - The percentage of disk space utilization that will trigger the event.
- Domain Usage (MB) - The disk space utilization in MB that will trigger the event.
- Domains Used - The number of domains that will trigger this event.
- Domains User (%) - The percentage of the total number of domains allowed that will trigger the event.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

Email Events

Users and system administrators can receive notifications based on the following email events:

- Message Received - Notifies users that they received a new email message.
- Message Sent - Notifies users that the mail server sent a message.

Depending on the event selected, the following event criteria are available:

- To Address - The email address to which the message was sent.
- Alias Name - The alias name that will trigger the event.
- From Domain - The domain from which the email message was sent.
- From Domain - The domain to which the email message was sent.
- Intra Domain - Select this option to trigger the event when an email is sent/received from within the domain.
- Size - The message size in KB that will trigger the event.
- Subject - The words that will trigger the event if found within the subject of the message.
- Spam Level - The spam level of the message that will trigger the event.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Add recipient
- Execute command-line
- Send email
- Use default notification profile for user
- Use notification profile

Mailing List Events

System administrators can receive notifications based on the following mailing list events:

- Mailing List Added - Notifies system administrators when a new mailing list is created.
- Mailing List Deleted - Notifies system administrators when an existing mailing list is deleted.
- Message Sent to Mailing List - Notifies system administrators when a new message is sent to the mailing list.

Depending on the event selected, the following event criteria are available:

- Domain - The domain on which the event occurs.
- From Address - The email address from which the message is sent to the mailing list.
- List Name - The mailing list name that will trigger the event.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

Security Events

System administrators can receive notifications based on the following security events:

- Abuse Detection Rule Triggered - Notifies system administrators when an abuse detection rule has been triggered.
- ClamAV Failure - Notifies system administrators when there has been a failure with the ClamAV service.
- Outgoing Message Blocked - Notifies system administrators when an outgoing message is blocked.
- SpamAssassin Failure - Notifies system administrators when there has been a failure with the SpamAssassin service.
- Virus Found - Notifies system administrator if a virus is found on the server.

Depending on the event selected, the following event criteria are available:

- ClamAV IP - The IP address of the ClamAV server that will trigger the event.
- ClamAV Port - The port of the ClamAV server that will trigger the event.
- Consecutive Failures - The number of consecutive failures that will trigger the event.
- File Name - The file name that will trigger the event.
- File Size - The size of the file in KB that will trigger the event.
- Full Name - The full name of the person that will trigger the event.
- IP Address - The IP address that will trigger the event.
- From Address - The email address from which the message was sent.
- Rule Name - The rule name that will trigger the event.
- Rule Type - The type of security rule that will trigger the event.
- Spam Weight - The spam weight of the message that will trigger the event.
- SpamAssassin IP - The IP address of the SpamAssassin server that will trigger the event.
- SpamAssassin Port - The port of the SpamAssassin server that will trigger the event.

- Subject - The words that will trigger the event if found within the subject of the message.
- Time of Day - The time frame during which the event occurs.
- To Address - The email address to which the message was sent.
- Virus Name - The virus name that will trigger the event.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

System Events

System administrators can receive notifications based on the following system events:

- Gateway Failure - Notifies system administrators when a gateway server has failed.
- License Expiration - Notifies system administrators when a license is about to expire.
- Memory - Notifies system administrators when a domain's or user's memory usage reaches a certain threshold.
- New Version Available - Notifies system administrators when a new version of the product is available.
- Service Started - Notifies system administrators when a new service is started.
- Service Stopped - Notifies system administrators when a service is stopped.
- Spool Count - Notifies system administrators when the spool count reaches a certain level.
- System Settings Changed - Notifies system administrators when any settings have been changed.
- System Uptime - Notifies system administrators when the uptime for the system reaches a certain point.
- Threads - Notifies system administrators when the thread count reaches a certain level.

Depending on the event selected, the following event criteria are available:

- Days Left - The number of remaining days that will trigger the event.
- Gateway Address - The address of the gateway that will trigger the event.
- Memory Used (%) - The percentage of memory used that will trigger the event.
- Memory Used (MB) - The amount of memory used in MB that will trigger the event.
- Service - The service that will trigger the event.
- Spool Count - The number of messages in the spool that will trigger the event.
- Thread Count - The number of threads that will trigger the event.
- Time of Day - The time frame during which the event occurs.

- Uptime (Days) - The number of days the system has been running that will trigger the event.
- Version - The version that will trigger the event.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

Throttling Events

System administrators can receive notifications based on the following throttling events:

- Domain Throttled - Notifies system administrators when a domain reaches the throttling threshold.
- User Throttled - Notifies system administrators when a license is about to expire.

Depending on the event selected, the following event criteria are available:

- Domain - The domain on which the event occurs.
- From Address - The email address from which the message is sent.
- Time of Day - The time frame during which the event occurs.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

User Events

Users and system administrators can receive notifications based on the following user events:

- User Added - Notifies system administrators when a new user is added.
- User Deleted - Notifies system administrators when an existing user is deleted.
- User Disk Space Used - Notifies users when the mailbox space utilization reaches a certain threshold.

Depending on the event selected, the following event criteria are available:

- Domain - The domain on which the event occurs.
- Full Name - The full name of the person that will trigger the event.
- Mailbox Usage (%) - The percentage of mailbox space utilization that will trigger the event.
- Mailbox Usage (MB) - The mailbox space utilization in MB that will trigger the event.

- Time of Day - The time frame during which the event occurs.
- Username - The username that will trigger the event.

Depending on the event selected, the following actions are available:

- Execute command-line
- Send email
- Use notification profile

Settings

My Settings

Account Settings

To edit your personal settings, click the settings icon . Then expand the My Settings folder and click Account Settings from the left tree view. The user settings will load in the content pane 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 login to SmarterMail.
- Password - The corresponding password used to login to Smartermail.
- Display Name - The name displayed on outgoing messages.
- Reply-to Email Address - The email address used in the reply-to header of messages sent through webmail. This address will be used by receiving email clients when replying to a message.
- Time Zone - The time zone the used.
- Disable Greylisting - Select this option to disable greylisting.

Webmail

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 - Permanently deletes 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 - 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.
- Enable preview pane - Select this option to view messages in the preview pane. 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 animations - Select this option to enable animation for items in the webmail interface.

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. Plus addressing also allows users to use special email addresses if they do not want to give out their real email address. For example, if user@example.com needs to provide a valid email address to sign up for a newsletter, he can sign up for the newsletter using the address user+technewsletter@example.com. When the newsletter is delivered, it will automatically be routed to the Technewsletter folder. If the folder does not exist, it will be created automatically. Note: For plus addressing to work, it is important that the folder name appears AFTER the username, but BEFORE the domain name. So the format should be:

username+foldername@domain .

- 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 - Select this checkbox to enable plus addressing.

Account Profile

The information contained in your account profile is publicly available to other users on the domain if the system administrator has enabled the Global Address List (GAL). Users can access your public contact information only by accessing the GAL through webmail or LDAP. Note: LDAP is a feature available to SmarterMail Enterprise users only.

To view or edit your account profile, click the settings icon . Then expand the My Settings folder and click Account Profile in the navigation pane. Your contact details will load in the content pane.

In general, contact details are divided into four sections:

- Personal Info - Your display name, title, first name, middle name, last name, suffix, email address, instant messenger, home page, and date of birth.
- Contact Info - Your home phone number, work phone number, mobile phone number, pager number, home and work fax numbers, and home address.
- Work Info - Your company name, job title, department, office, work address, and website URL.
- Additional Info - Type any additional details about yourself.

Auto Responder

Users can set up auto-responders to automatically send a prewritten response when an email message is received. They are commonly used to notify senders that the recipient is out of the office or on vacation.

To set up an auto-responder, click the settings icon . Then expand the My Settings folder and click Auto-Responder in the navigation pane. The auto-responder settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Enable auto-responder - Select this checkbox to turn the auto-responder on.
- Disable responses to indirect mail - By selecting this checkbox, the auto-responder will only be triggered by email sent directly to you. Any email you receive through a mailing list, forward, or an alias will not trigger the auto-responder.
- Limit responses to once daily - Select this checkbox to ensure an email address only receives the auto-responder message 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

Use this tab to specify to customize the auto-responder message. Note: This tab is only available if the auto-responder is enabled.

- Subject - The words or phrase that appears in the subject of the auto-responder message (e.g. Out of Office).
- Compose Format - To specify whether the auto-responder displays in plain text or HTML, select the appropriate option from the list.
- Message - Type the text of the auto-responder in this field. For example: I will be out of the office from June 1 to June 15. I will respond to your message upon my return to the office on June 16. If you need immediate assistance, please contact Jane Doe at jdoe@example.com.

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 icon . Then expand the My Settings folder and click Trusted Senders in the navigation pane. A list of trusted senders will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new trusted sender.
- Edit - Edits an existing trusted sender.
- Delete - Permanently deletes the selected trusted sender(s).

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 icon . Then expand the My Settings folder and

click Signatures in the navigation pane. 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 content pane toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the content pane toolbar.

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 access the folder auto-clean settings, click the settings icon . Then expand the My Settings and Filtering folders and click Folder Auto-Clean in the navigation pane. Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

The folder auto-clean settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Use default auto-clean settings - Select this checkbox to adopt the auto-clean policy set by your email host or domain administrator. Note: If the administrator changes the policy, yours will automatically change with too.
- Override auto-clean settings for this account - Select this checkbox 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.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this

tab. If you chose to override the settings, you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

These options will be visible if size is chosen:

- Folder Size Before Auto-clean - The maximum size of the folder. Once the folder reaches this size, the auto-clean process is started and older messages (messages that were received the longest time ago) are deleted.
- Folder Size After Auto-clean - The goal size of the folder. When auto-cleaning, SmarterMail will delete older messages until the folder reaches this size. Note: This number should always be lower than the "before" number.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

These options will be visible if date is chosen:

- Mail Age - The maximum number of days mail will stay in the selected folder before deletion.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected 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 messages from a specific email address to another account, or even alter the subject of specific types of email. Content filtering is very flexible in order to allow you to filter messages the way you want to.

To access your content filtering settings, click the settings icon . Then expand the My Settings and Filtering folders and click Content Filtering in the navigation pane.

To add a new filter, click New in the content pane toolbar. The content filter wizard will load in the content pane.

To edit an existing filter, select the desired filter and click Edit in the content pane toolbar.

Note: 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 antis spam 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 icon . Then expand the My Settings and Filtering folders and click and click Spam Filtering in the navigation pane. The spam filtering settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Use default spam settings - Select this checkbox to accept the default spam options provided by your domain administrator.
- Override spam settings for this account - Select this checkbox to customize the way spam is handled and to override the settings created by the domain administrator.

Actions

When you override the spam options set by your system administrator, you can choose the actions that are taken when email comes in that has a low, medium, or high probability of being spam. For each spam level, choose the action you wish to have taken. If you choose to add text to the subject line of messages, type the text in the box below the action drop down. Note: If you are using the default spam options that were set up by your administrator, these settings cannot be edited.

Current Weights

Each type of spam check has an associated weight that factors into the spam probability of a message. When an email comes in, all of the checks listed are run, and for each check that the message fails, the weight is added to the overall score of the email. The thresholds for each spam probability are examined, and the email is placed into the appropriate category.

Sharing

Shared Resources

The Enterprise and Free editions of SmarterMail allow users to share their email folders and collaboration items with other users on the domain. If you share any of the following items, they are called shared resources:

- Email folders
- Contacts
- Calendars
- Tasks
- Notes

To see a list of items you are sharing with others, click the settings icon . Then expand the My Settings and Sharing folders and click Shared Resources in the navigation pane. A list of shared resources will load in the content pane.

In general, the following options are available in the content pane toolbar:

- New - Creates a new shared resource.
- Edit - Edits an existing shared resource.
- Delete - Permanently deletes the ability to share the selected item(s).

Mapped Resources

The Enterprise and Free editions of SmarterMail allow users to share their email folders and collaboration items with other users on the domain. If a user shares any of the following items with you, they are called mapped resources:

- Email folders
- Contacts
- Calendars
- Tasks
- Notes

To see a list of items other users are sharing with you, click the settings icon . Then expand the My Settings and Sharing folders and click Mapped Resources in the navigation pane. A list of mapped resources will load in the content pane.

In general, the following options are available in the content pane toolbar:

- Attach - Attaches the selected mapped resource(s) to your account so they are accessible. For example, if you attach a co-worker's calendar to your account, you can access this mapped resource from the contacts area of the webmail interface by clicking the contacts selector and choosing the appropriate option.
- Detach - Edits an existing mapped resource.
- Edit - Permanently removes the selected item(s) from the mapped resources list.

Advanced Settings

Auto-complete

Because most users send email to the same recipients, SmarterMail automatically pulls email addresses from your Sent Items folder, your contacts, and the Global Address Directory (GAL) and saves them separately from emails in your contacts list. These auto-saved email addresses are then used to auto-complete the To and Cc fields when applicable.

To view the list of email addresses used for the auto-complete feature, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Auto-complete in the navigation pane. A list of email addresses will load in the content pane.

Addresses that were pulled from your Sent Items folder can be deleted from the auto-complete list by selecting the addresses and clicking Delete in the content pane toolbar. Note: Addresses pulled from the GAL or your contacts list cannot be deleted from the auto-complete list.

Calendar Settings

To view your calendar settings, click the settings icon . Then expand the My Settings and Advanced Settings Folder and click Calendar Settings in the navigation pane. The calendar settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Default Calendar View - To specify the default calendar view (daily, weekly, monthly, or all appointments), select the appropriate option from the list.
- Enable display of weekends in the weekly view - Select this option to set the weekly calendar view to include the weekends.
- Enable display of weekends in the monthly view - Select this option to set the weekly calendar view to include the weekends.

Tasks

Use this tab to specify the following task-related settings:

- Enable display of task start times in the calendar view - Select this option to view the date and time a task is scheduled to start on the calendar.
- Enable display of task due times in the calendar view - Select this option to view the date and time a task is scheduled to be completed on the calendar.
- Disable display of completed tasks - Select this option to remove completed tasks from the calendar view.

Weather

U.S. users can view the 7-day weather forecast on their calendar. To enable this option, type your postal code in the appropriate field and select the Enable weather checkbox. Weather forecasts are provided by the National Weather Service.

Visible Hours

SmarterMail users can use this tab to customize their calendar to display their typical hours. For example, if you typically schedule appointments from 8 a.m. to 5 p.m., you can configure the visible hours to correspond with those times. Users can also configure the visible hours for each day of the week to allow for flexibility in your schedule.

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 the settings icon . Then expand the My Settings and Advanced Settings folders and click Message Retrieval in the navigation pane.

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.

Notification Profiles

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

To view a list of current notification profiles, click the settings icon . Then expand the My Settings and Advanced Settings folders and click Notification Profiles . Your notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Edits an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- **Notification Profile Name** - The name of the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent.
- **Enable** - Checking this box will enable email notifications.
- **SMS Email Address(es)** - The mobile device email address to which notifications are sent.
- **Enable** - Checking this box will enable SMS notifications.
- **Enable Reminders** - Checking this box will display reminders for tasks and appointments in a popup window in webmail.

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 the settings icon . Then expand the My Settings and Advanced Settings folders and click SMTP Accounts in the navigation pane.

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.

Domain Settings

General Settings

This settings page is only available to domain administrators.

Domain administrators will use this section to adjust any general domain settings. To access this section, click the settings icon . Then expand the Domain Settings folder and click General Settings in the navigation pane. The general settings will load in the content pane and the following tabs will be available:

Skin

Use this tab to choose a default skin for all of the mailboxes on a specific domain. Note: If the system administrator does not allow users or domain administrators to override the system settings, this tab will not be visible.

- Default Skin - Select the skin you wish to set as the default from the list.
- Enable Users to Override Skin - Select this option to allow users to choose their own mailbox skin.

Sharing

When a user adds a member from the Global Address List as an attendee on a calendar appointment, SmarterMail can alert the user of any potential scheduling conflicts. In addition, the user can view an Availability window to review the times that their attendee is free/busy. The following setting impacts whether the calendar availability of GAL members is shown in the calendar conflicts and availability window:

- Enable public availability for all users - This setting is enabled by default and will allow users on the domain to review scheduling conflicts and availability for members in the Global Address List. When unchecked, domain users' scheduling information will not be displayed in the appointment window.

Mailing Lists

Use this tab to specify the following mailing list settings:

- Webmail URL - The URL for the SmarterMail login page. Note: URLs should include the http:// prefix. For example: http://mail.example.com/

- Enable - Select this option to override the server's configured hostname for use in mailing list communications.
- Deletion Bounce Threshold - The number of times a message to a specific subscriber may bounce before the subscriber removed from the mailing list. By default, the threshold is set to 5.
- Enable - Select this option to enable the deletion bounce threshold. By default, this setting is enabled.

Users

This settings page is only available to domain administrators.

An email user account represents a person's actual mailbox. User accounts can receive email, send email, and login to the Webmail interface.

To view a list of users on a domain, click the settings icon . Then expand the Domain Settings folder and click Users in the navigation pane. A list of users will load in the content pane.

To edit a user's settings, select the desired user and click Edit in the content pane toolbar. The user settings will load 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 login to SmarterMail.
- Authentication Mode - The authentication method used to login to SmarterMail.
- Password - The corresponding password used to login to Smartermail.
- Display Name - The name displayed on outgoing messages.
- Reply-to Email Address - The email address used in the reply-to header of messages sent through webmail. This address will be used by receiving email clients when replying to a message.
- Time Zone - The time zone the used.
- Mailbox Size Limit - The maximum size of the mailbox. By default, the maximum mailbox size is 100 MBs.
- Disable user - Select this option to disable the account.
- Enable domain administrator access - Select this option to allow the user to edit domain settings.
- Disable password changes - Select this option to prevent the user from changing the login password.
- Enable ActiveSync - Select this option to allow this account to sync via the Exchange

ActiveSync add-on.

- Hide from Global Address List - Select this option to remove the user from the Global Address List. Use this option on accounts that are not tied to real people, such as support@example.com.
- Enable POP retrieval - Select this option to allow users to download email from POP mail servers.
- Enable IMAP retrieval - Select this option to allow users to download email from IMAP mail servers.
- Enable outgoing mail signing - Select this option to enable mail signing for outgoing messages.

Webmail

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 - Permanently deletes 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 - 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. 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.
- 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 animations - Select this option to enable animation for items in the webmail interface.

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 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.

Groups

This feature is only available in SmarterMail Enterprise edition.

Groups are used to specify permissions for shared items and for the Global Address List. To specify which groups the user belongs to, select the appropriate groups. Note: Only domain administrators can assign users to groups. If the domain administrator has not defined any groups within the User Groups settings page, no groups will be available.

Throttling

Throttling limits the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. Use this tab to edit the following throttling settings:

- Outgoing Messages per Hour - The number of messages sent by the domain per hour. By default, the number of outgoing messages is 5,000.

- Enabled - Check this box to enable throttling for outgoing messages.
- Outgoing Bandwidth per Hour - The total number of MBs sent by the domain per hour. By default, the outgoing bandwidth is 100.
- Enabled - Check this box to enable throttling for bandwidth.

Plus Addressing

Plus addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. Plus addressing also allows users to use special email addresses if they do not want to give out their real email address. For example, if user@example.com needs to provide a valid email address to sign up for a newsletter, he can sign up for the newsletter using the address user+technewsletter@example.com. When the newsletter is delivered, it will automatically be routed to the Technewsletter folder. If the folder does not exist, it will be created automatically. Note: For plus addressing to work, it is important that the folder name appears AFTER the username, but BEFORE the domain name. So the format should be:
username+foldername@domain .

- 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 - Select this checkbox to enable plus addressing.

Service Access

This tab indicates a user's access to POP, IMAP, SMTP and webmail services.

- Enable POP access - Select this option to allow the user to download mail using POP3.
- Enable IMAP access - Select this option to allow the user to download mail using IMAP.
- Enable incoming SMTP Access - Select this option to allow users to receive email from external domains.
- Enable outgoing SMTP access - Select this option to allow users to send email to external domains.
- Enable webmail access - Select this option to allow users to login to SmarterMail from the webmail interface.

Email Aliases

This settings page is only available to domain administrators.

An email alias is simply a forwarding email address. Using an email alias allows a message addressed to one mailbox to be redirected to another mailbox.

For example, in a working environment with multiple email addresses, the office may want to make a central email address that distributes messages to all personnel. The alias `workplace@example.com` can be made for messages to be sent and then distributed to all of the employees.

To view a list of email aliases for the domain, click the settings icon . Then expand the Domain Settings folder and click Aliases in the navigation pane. A list of email aliases will load in the content pane.

To create a new email alias, click New in the content pane toolbar. To edit an existing email alias, click Edit in the content pane toolbar. The email alias settings will load in the content pane and the following options will be available:

- Name - The name of the alias. This name will be used to create the email alias address. For example, if you named the alias "info" and the domain was "example.com," the email alias address would be `info@example.com`.
- Disable greylisting - Select this option to disable greylisting for the email alias.
- Emails - Type the full email address(es) of the users who should receive the messages sent to this alias.

Note: Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address since no email is ever actually stored for the alias. Emails are just sent to the list of addresses provided for the alias.

Trusted Senders

This settings page is only available to domain administrators.

This setting allows domain administrators to list specific email addresses (such as `jsmith@example.com`) or domains (such as `example.com`) that will be exempted from spam filtering. 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.

To view the trusted senders list for the domain, click the settings icon . Then expand the Domain Settings folder and click Trusted Senders in the navigation pane. A list of trusted senders will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new trusted sender.
- Edit - Edits an existing trusted sender.
- Delete - Permanently deletes the selected trusted sender(s).

Signatures

This settings page is only available to domain administrators.

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.

Businesses that want to ensure a consistent company appearance may require employees to follow a specific signature format. Instead of allowing the users to define their own signatures, the domain administrator can create a domain-wide signature that all employees must use. Depending on the signature configurations set up by the domain administrator, users may or may not be able to override the default signature.

To access the signature settings for a domain, click the settings icon . Then expand the Domain Settings folder and click Signatures in the navigation pane. 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 specific domains. To allow users the ability to create and use their own signatures, select the Enable users to override checkbox. Note: If this setting is disabled, users must use the domain-wide signature.

Signatures

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

Notification Profiles

This settings page is only available to domain administrators.

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the

disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

Although users can set up their own notification profiles, some organizations may find it beneficial to create a notification profile that applies to all domain administrators. You can use this page to do so.

To view a list of notification profiles, click the settings icon . Then expand the Domain Settings folder and click Notification Profiles in the navigation pane. Your notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Edits an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- **Notification Profile Name** - The name of the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent.
- **Enable** - Select this option to enable email notifications.
- **SMS Email Address(es)** - The mobile device email address to which notifications are sent.
- **Enable** - Select this option to enable SMS notifications.
- **Enable Reminders for all domain administrators** - Select this option to send a reminder to all domain administrators when the event is triggered.

Filtering

Domain Folder Auto-clean

This settings page is only available to domain administrators.
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Folder Auto-clean is a method for limiting how much of a user's disk space is used by the Junk E-Mail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, domain

administrators can help ensure that user accounts do 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 access the folder auto-clean settings, click the settings icon . Then expand the Domain Settings and Filtering folders and click Folder Auto-Clean in the navigation pane. Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

The folder auto-clean settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Use default auto-clean settings - Select this option to adopt the auto-clean policy set by your email host or domain administrator.
- Override auto-clean settings for this account - Select 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.
- Enable users to override auto-clean settings - Select this option to allow users to create their own auto-clean policies.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab. If you chose to override the settings, you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

These options will be visible if size is chosen:

- Folder Size Before Auto-clean - The maximum size of the folder. Once the folder reaches this size, the auto-clean process is started and older messages (messages that were received the longest time ago) are deleted.
- Folder Size After Auto-clean - The goal size of the folder. When auto-cleaning, SmarterMail will delete older messages until the folder reaches this size. Note: This number should always be lower than the "before" number.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

These options will be visible if date is chosen:

- Mail Age - The maximum number of days mail will stay in the selected folder before deletion.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Domain Content Filtering

This settings page is only available to domain administrators.

Domain content filtering allows you to create the same types of content filters as you can on the user level, but the filters added will be applied to all members of a domain. The evaluation of domain content filters happens before the evaluation of account-specific content filters. For more information about how to add a content filter, refer [Content Filtering](#) .

Note: Be aware that many users will prefer to set their own content filtering. You may want to minimize filtering at the domain level to only filter items that affect the entire domain.

Spam Filtering

This settings page is only available to domain administrators.

SmarterMail includes many advanced antispam measures that will help protect your users from unwanted email. The system administrator has probably already set up some default spam options.

To view your spam filtering settings, click the settings icon . Then expand the Domain Settings folder and click Spam Filtering in the navigation pane. The spam filtering settings will load in the content pane and the following tabs will be available:

Options

Use this tab to set the following spam filtering options for the domain:

- Use default spam settings - Choose this option to accept the default spam options provided by your system administrator. The settings will be displayed for your reference.
- Override spam settings for this domain - Select this option to customize the way spam is handled. Spam check weights and actions will become overridable by end users. More information about the types of actions allowed can be found below.

Actions

When you override the spam options set by your system administrator, you can choose the actions that are taken when email comes in that has a low, medium, or high probability of being spam. For each spam level, choose the action you wish to have taken. If you choose to add text to the subject line of messages, type the text in the box below the action drop down.

Current Weights

Each type of spam check has an associated weight that factors into the spam probability of a message. When an email comes in, all of the checks listed are run, and for each check that the message fails, the

weight is added to the overall score of the email. The thresholds for each spam probability are examined, and the email is placed into the appropriate category.

[Mailing Lists](#)

Mailing Lists

This settings page is only available to domain administrators.

A mailing list is a collection of names and email addresses used by an individual or an organization to send messages to multiple recipients. For example, many companies use mailing lists to email newsletters, promotional offers, or information about product updates to subscribers.

To view the mailing lists for your domain, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. A list of the mailing lists for the domain will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple mailing lists. Mailing lists must be selected before choosing an action from the actions toolbar.
- **List Name** - The name of the mailing list.
- **Moderator** - The "owner" of the mailing list.
- **Description** - A brief summary of the mailing list.
- **Subscribers** - The number of people currently subscribed to the mailing list.
- **Digest Subscribers** - The number of subscribers that receive a digest of mailing list postings.

The following actions are available from the content pane toolbar:

- **New** - Clicking this button will allow the domain administrator to create a new mailing list.
- **Edit** - Clicking this button will allow the domain administrator to edit an existing mailing list's settings.
- **Delete** - Clicking this button will allow the domain administrator to delete an existing mailing list.
- **Send Digest** - Clicking this button will allow the domain administrator to send a digest of mailing list postings.

Mailing List Messages

SmarterMail's mailing list feature combines the functionality of discussion and announcement lists and can be used to send both types of messages. To create a new mailing list message, simply compose a new email message and send it to the mailing list email address.

By default, when a subscriber reads a mailing list message, the From field in the subscriber's inbox will display the email address of the individual that sent the mailing list message; the To field will display the list name or mailing list email address; and the Reply To field will display the mailing list email address or the email address of the individual that sent the message, depending on the list settings. Note: Domain administrators and mailing list moderators can customize the From, To, and Reply To fields by editing the mailing list settings.

Create a New Mailing List

This settings page is only available to domain administrators.

To view the mailing lists for a specific domain, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. To create a new mailing list, click the New button in the content pane toolbar. You can also edit an existing mailing list by selecting the desired mailing list and clicking the Edit button in the content pane toolbar.

List Settings

Use this tab to edit the following mailing list settings:

- Name - The name of the mailing list. SmarterMail will use the name to create the email address associated to this mailing list.
- Moderator - The "owner" of the mailing list. The moderator must be a user in your domain.
- Password -To restrict subscribers from sending emails to a mailing list, type a password in this field. Note: To send emails to a mailing list that is password protected, you must send the password in the subject enclosed by brackets and colons. For example, Subject: [:password:] Attention all subscribers).
- Enabled - Check this box to enable password protection for this mailing list.
- Allowed Posters - An email that is sent to the mailing list (and therefore to its subscribers) is considered to be "posted". Use this field to specify who has access to post to the list.
- Anyone - Setting the list to "anyone" means that when anyone, regardless of whether they are subscribed to the list or not, sends an email to the list, it will be sent out to all members. Note: This setting can cause abuse if it is not closely monitored.
- Subscribers Only - Setting the list to "subscribers only" allows the list subscribers, and only the list subscribers, to send and receive posts. The moderator will still be permitted to post.
- Moderators Only - If the moderator is set as the post option, only the moderator will be able to post to the list. This means that no one else, not even list subscribers, will be able to post.
- List To Address - The email address that will display in the To field when a subscriber receives a mailing list message.

- List From Address - The email address that will display in the From field when a subscriber receives a mailing list message.
- List Reply To Address - The email address that will display in the Reply To field when a subscriber receives a mailing list message.
- Subject Prefix - The optional text that will appear in the subject line. SmarterTools recommends using a subject prefix for discussion lists to help subscribers easily through filter posts.
- Enabled - Check this box to enable the subject prefix for this mailing list.
- Max Message Size - The maximum number of KBs a message can be. If the message exceeds this size, it will not be posted. By default, the max message size is unlimited.
- Disable Mailing List - Check this box to disable the mailing list.
- Description - A brief summary of the mailing list.

Options

Use this tab to enable or disable the following mailing list optionsL

- Enable Digest Mode - Select this option to enable digest mode. For more information, see the Digest Settings tab.
- Enable Replies to List - Select this option to allow subscribers to send replies to the entire mailing list. If this option is disabled, the reply will be sent to the person who posted the original message on the list.
- Enable Header - Select this option to append header text to the beginning of the mailing list message. Note: To edit the header text, click the System Messages tab and edit the appropriate system message.
- Enable Footer - Select this option to append footer text to the end of the mailing list message. Note: To edit the footer text, click the System Messages tab and edit the appropriate system message.
- Send Subscribe Email - Select this option to automatically send an email to new subscribers.
- Send Unsubscribe Email - Select this option to automatically send an email response to unsubscribe requests.
- Enable Poster Whitelist - Select this option to allow whitelisted email addresses to post to the mailing list.
- Enable SUBSCRIBE Command - Select this option to allow people to subscribe to the mailing list by emailing a listserv command to the command address. For more information, refer to Listserv Commands . Note: If this option is disabled, only list administrators can add new subscribers to the mailing list.
- Enable LIST Command - Select this option to allow people to receive a list of the mailing list

subscribers by emailing a listerv command to the command address. For more information, refer to Listserv Commands . Note: It is recommended that you leave this option disabled, as people or automated systems could use the user list for malicious purposes.

- Enable Unsubscribe from Subject - Select this option to allow subscribers to unsubscribe from the mailing list by sending an email to the list with the word "unsubscribe" in the subject line. It is recommended that you usually keep this option enabled, as it will reduce complaints of abuse by giving subscribers a way to quickly opt-out of the mailing list.
- Enable Double Opt In - Select this option to automatically send an email confirmation to new subscribers.
- Disable List Error Replies - Select this option to prevent the system from automatically replying to incorrect listserv commands.

Digest Settings

To reduce the number of emails mailing list subscribers receive, domain administrators can allow subscribers to sign up for digest mode or normal mode. Essentially, digest mode condenses all the messages sent to the list into a single email that is sent to subscribers on a monthly, biweekly, weekly, daily, or other defined basis. Use this tab to edit the following digest settings:

- Last Sent - The date and time a digest email was sent to subscribers.
- Subject - The subject line for the digest email.
- Trigger Type - The frequency of the digest emails.
- Digest Format - The format (HTML, text, etc.) in which digest emails are sent.
- Disable non-text attachments in digest - Select this option to remove non-text attachments from the digest email.
- Enable Header - Select this option to append header text to the beginning of the mailing list message. Note: To edit the header text, click the System Messages tab and edit the appropriate system message.
- Enable Separator - Select this option to place a separator between messages in a digest email.
- Enable Footer - Select this option to append footer text to the end of the mailing list message. Note: To edit the footer text, click the System Messages tab and edit the appropriate system message.

System Messages

Use this tab to edit system messages for mailing lists. Note: This tab is not visible if you are creating a new mailing list.

Throttling

Throttling allows domain administrators to limit the number of messages and/or how much bandwidth a mailing list can use. Use this tab to edit the following throttling settings:

- **Outgoing Messages per Hour** - The number of messages sent by the mailing list per hour. By default, the number of outgoing messages is 5,000.
- **Enabled** - Check this box to enable throttling for outgoing messages.
- **Outgoing Bandwidth per Hour** - The total number of MBs sent by the mailing list per hour. By default, the outgoing bandwidth is 100.
- **Enabled** - Check this box to enable throttling for bandwidth.

Subscribers

This settings page is only available to domain administrators.

Individuals that sign up to receive messages from the mailing lists are called subscribers. To view a list of the mailing list subscribers, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Subscribers in the navigation pane. A list of subscribers will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple mailing lists. Mailing lists must be selected before choosing an action from the actions toolbar.
- **Email Address** - The email address of the subscriber.
- **Bounces** - The number of bounced messages to the subscriber.

The following actions are available from the content pane toolbar:

- **New** - Clicking this button will allow the domain administrator to add a new subscriber.
- **Edit** - Clicking this button will allow the domain administrator to edit subscriber details.
- **Delete** - Clicking this button will allow the domain administrator to delete a subscriber.
- **Search** - Clicking this button will allow the domain administrator to search for a specific subscriber by email address or by any defined subscriber fields.
- **Upload** - Clicking this button will allow the domain administrator to upload a list of subscribers to the mailing list. Note: Only CSV files can be uploaded.
- **Download** - Clicking this button will allow the domain administrator to download the list of subscribers as a text file.

For step-by-step instructions on adding subscribers to a mailing list, please refer to the KB article [How To - Add Subscribers to Mailing Lists](#). To edit an existing subscriber's details, select the desired subscriber from the list and click Edit in the content pane toolbar.

Note: Individuals that opted to receive the digest mode will not be included in the Subscribers list. To view a list of digest subscribers, click the settings icon . Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the navigation pane. Select the desired mailing list and click Edit. Then click Subscribers in the content pane toolbar and click Digest Subscribers .

Subscriber Fields

This settings page is only available to domain administrators.

Use subscriber fields to create custom fields to gather and manage information about subscribers. Subscriber fields are also used as variables in mailing list messages and can be used to include personal information about the subscriber when conducting a mail merge.

Advanced Settings

Domain Aliases

This settings page is only available to domain administrators.

A domain alias is an alias for a secondary domain name that points to an existing email account on the server under an existing primary domain name.

For example, a full email address requires a user name and a domain name (ex. `user@example.com`). If you add a domain alias on a secondary domain like "example-alias.com" then not only will "user@example.com" be valid, but the same mailbox will also work with "user@example-alias.com". If an email was sent to both emails then the "user" mailbox would get two copies of the emails.

Note: Messages cannot be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.

To view a list of domain aliases, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click then select Domain Aliases in the navigation pane.

To create a new domain alias, click New in the content pane toolbar. The domain alias settings will load in the content pane and the following options will be available:

- Name - The name of the domain alias. The name will be used to create the domain alias email address. For example, if the name of the alias is "example2," the domain alias email address will

be user@example2.com.

- Points To - The domain the alias redirects to.
- Verify MX record in DNS before add - Select this option to check that the mail exchange record for the domain is pointing to the server. Note: This option is only available to system administrators and prevents users from "hijacking" mail from valid domains. For example if this check were not in place a user could add a domain alias of example.com. Then, any mail sent from the server to "anything@example.com" would go to the domain with the example.com domain alias, rather than to the actual domain.

Mail Signing

This settings page is only available to domain administrators.

Mail signing protocols, such as DomainKeys and DKIM signing, verify the authenticity of a message and can be used to protect users from phishing schemes or spam attacks.

To edit the mail signing settings, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click Mail Signing in the navigation pane.

Options

Use this tab to edit the following options:

- Enable DomainKey Signing - Select this option to authenticate email with DomainKeys headers.
- Enable DKIM Signing - Select this option to to authenticate email with DKIM headers.

Certificate

Use this tab to edit the following settings:

- Selector - Type any identifier you like in this field. It is recommended the key is changed once every 12 months.
- Key Size - The size of the key. Remember, the larger the key, the stronger it is.

DomainKeys Signing

Use this tab to specify how closely you want the system to monitor messages in transit.

- nofws - This is the default and will allow basic in-transit changes to messages.
- Simple - This is more strict and will not allow as many in-transit changes to messages.

DKIM Signing

Use this tab to specify how closely you want the system to monitor messages in transit.

- Body Canonicalization - The method used to monitor in-transit changes to the body of a message.
- Header Canonicalization - The method used to monitor in-transit changes to the header of a message.
- Hash Algorithm - The method used to verify the DKIM signature.
- Header Field Signing - The header fields included in the hash algorithm. This is further defined by header fields.
- Header Fields - The header fields included in the hash algorithm.

Import LDAP Users

This feature is only available to domain administrators running SmarterMail Enterprise.

Domain administrators can add new SmarterMail users via the LDAP protocol. To import new users, type the LDAP binding string in the field.

User Groups

This feature is only available to domain administrators running SmarterMail Enterprise.

User groups are used to give permissions to specific subsets of users on the domain to access shared resources. For example, if a business wanted to make it easy for members of its sales department to share their calendars with other team members, the domain administrator would create a user group for all the sales department employees.

By default, there are permanent user groups that cannot be edited:

- Everyone - All users on the domain belong to this group automatically.
- Administrators - All users that are marked as domain administrators for this domain belong to this group.

To view the user groups for the domain, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click User Groups in the navigation pane. A list of user groups will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new user group.
- Edit - Edits the members of the selected user group.
- Delete - Permanently deletes the selected user group(s).

Default User Settings

This settings page is only available to domain administrators.

Default user settings apply to all new email users added in your domain. Editing the default settings does not change users that are already in place in your domain.

The default user settings are almost identical to those found when adding a user. For more information on these settings, refer to [Users](#) .

User Propagation

This settings page is only available to domain administrators.

Use this section to apply global default settings to some or all of the users on a domain. To access user propagation, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click user Propagation in the navigation pane. The default user settings will load in the content pane. For more information on these settings, refer to [Users](#) .

To apply some or all of the default settings to some or all of users on the domain, select the appropriate settings and click Propagate Now .

Advanced Search

Advanced Search Overview

SmarterMail users can take advantage of the mail server's powerful search feature to search specific sections of their mailbox (everywhere, email, contacts, or calendars). Search results are then displayed by the type of result (email, contacts, or appointments), making it easy to find the information you are looking for.

To access the advanced search feature, click the advanced search icon .

For help understanding the different areas of the advanced search section, see the advanced search diagram .

Performing Advanced Searches

To select which section of the mailbox to search, click the search selector and select the appropriate option from the list. In general, users can search everywhere, their email, contacts, or calendars.

Then type the search criteria in the search bar located near the top of the navigation pane and click the Search button. SmarterMail will automatically search for matches and display the results in the content pane.

In general, the following options are available from the navigation pane toolbar:

- New - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- Reset - Clears the search box and any previous search results that may be displayed in the content pane.

In general, the following options are available from the content pane toolbar:

- Open - Opens the selected email, contact, or appointment item.
- Delete - Permanently deletes the selected email, contact, or appointment item.

Note: Users can also narrow the search locations by specifying search criteria. For example, if a user performing a search of his email can click Add Criteria and select From to ensure SmarterMail only returns results that have the search text in the From field.

[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](#).

Listserv commands

This feature is only available to domain administrators.
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Listserv commands allow you to control the list through commands sent in email messages to the `cistserv sommand` address. By default, the command address for a domain is `"STServ@example.com"`, where `example` is the name of your domain. However, your system administrator may change this command address.

To send a command, compose an email to the command address with the command in the body of the message. The subject of the message is ignored.

Available Commands

Note: Any references to `listname` should be replaced with the list you are trying to use.

`Help listname` - Replies to the email with the contents of the Help system message for that list.

`List` - Replies to the email with a list of all available lists.

`List listname` - Replies to the email with a list of all subscribers for a particular list. Note: This command can be disabled by the domain administrator.

`Subscribe listname` - Adds your email address to the subscribers list of the mailing list. Note: This command can be disabled by the domain administrator.

`Unsubscribe listname` - Removes your email address from the subscribers list for the mailing list referenced by `listname`.

Set mode digest listname - Sets your email address to receive emails in digest mode, which will send all messages for the list combined into one email at regular intervals.

Set mode standard listname - Sets your email address to receive emails in standard mode (the default), which will send messages one at a time to your email account.

Using a Catch-All

This feature is only available to domain administrators.

A catch-all alias can be established that can receive all incoming email that goes to invalid email addresses within your domain. You may want to do this, for example, if customers frequently send to accounts that do not really exist. In general, however, use of a catch-all alias is not recommended, as it makes you more prone to harvesting attacks.

For information on setting up and assigning a catch-all alias, refer to the KB article [How To -- Enable or Disable Catch-alls](#) .

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

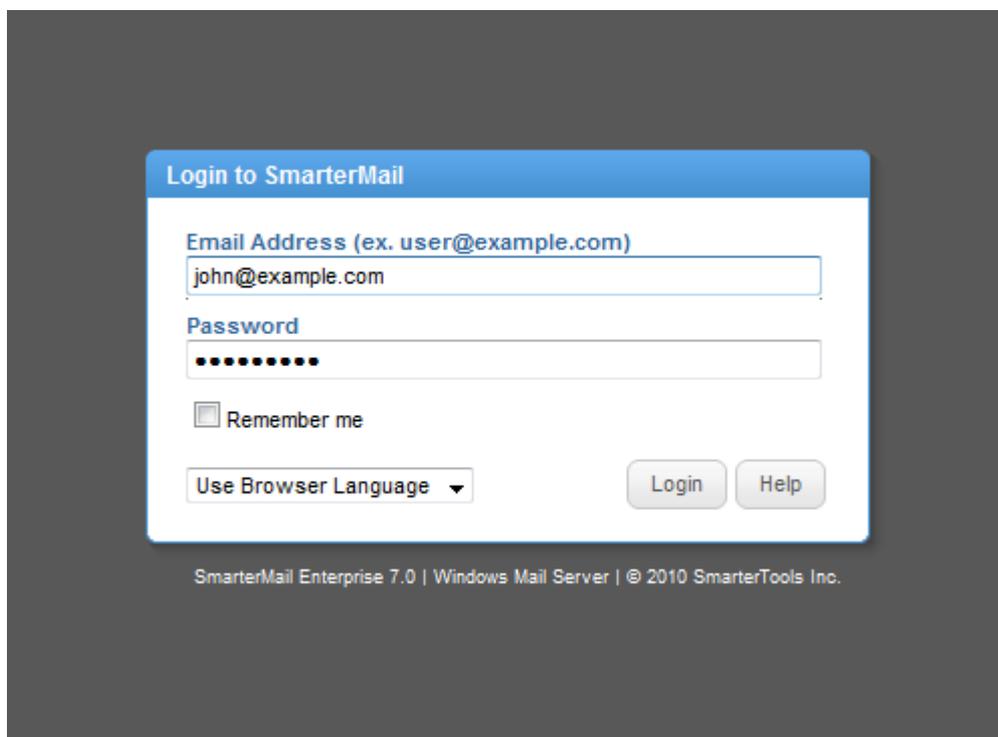
[Help for System Administrators](#)

Logging in to SmarterMail

To access the login page, SmarterMail system administrations will need to navigate their Web browser to the location of the SmarterMail installation. By default, this URL is `http://127.0.0.1:9998` (if running the browser on the server itself, otherwise use the IP address of the server instead of 127.0.0.1), but it may be different if you have changed the location of SmarterMail.

To login to SmarterMail, type in the system administrator username and password in the appropriate fields and click Login . Note: By default, the username and password are both "admin" (without the quotes). If everything matches up, you will be presented with the manage domains page or the activation wizard (if you have yet to activate SmarterMail).

To stay logged in to SmarterMail even after closing the browser, be sure to select the Remember Me checkbox. This will allow SmarterMail to encrypt the email address and password. Note: Browser cookies must be enabled for this feature to work. In addition, SmarterTools does not recommend selecting this option if you use a public or shared computer.



The image shows a screenshot of the SmarterMail login dialog box. The dialog has a blue title bar that says "Login to SmarterMail". Below the title bar, there are two input fields: "Email Address (ex. user@example.com)" and "Password". The email address field contains "john@example.com" and the password field contains a series of black dots. Below the password field, there is a checkbox labeled "Remember me" which is currently unchecked. At the bottom left, there is a dropdown menu labeled "Use Browser Language" with a downward arrow. At the bottom right, there are two buttons: "Login" and "Help". At the very bottom of the dialog, there is a small line of text: "SmarterMail Enterprise 7.0 | Windows Mail Server | © 2010 SmarterTools Inc."

Manage

All Domains

System administrators can use this section to manage all of the domains in SmarterMail. To view all domains, click the manage icon and then click All Domains in the navigation pane. A list of domains will load in the content pane and the following columns will be available:

- **Checkbox** - Use these boxes to select multiple domains. Domains must be selected before choosing an action from the content pane toolbar.
- **Domain Name** - The name of the domain. For example, smartermail.com or example.com.
- **Size** - The amount of disk space used by all mailboxes on the domain.
- **File Storage** - The amount of disk space used for file storage on the domain.
- **Users** - The number of users (mailboxes) on the domain.
- **Aliases** - The number of alias addresses on the domain.
- **Mailing Lists** - The number of mailing lists on the domain.

In general, the following options are available from the content pane toolbar:

- **Edit** - Edits the settings for the selected domain.
- **Delete** - Permanently deletes the selected domain(s).
- **Manage** - Impersonates the domain administrator and give the system administrator access to all of the domain settings.

Creating New Domains

To create a new domain, click the manage icon . Then click New in the navigation pane toolbar and click New Domain . The domain settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following domain options:

- **Name** - The name of the domain. For example, smartermail.com or example.com. Note: To send or receive mail, the domain name must match the domain name registered with the DNS server.
- **IP Address** - The IP address for which the domain will check for incoming requests. Note: This setting does not affect Web interface login and is only used to check for SMTP, POP, and IMAP traffic. This IP address should match at least one MX record on your DNS server.
- **Folder Path** - The directory in which all information (XML files, mail statistics, alias

information, etc.) pertaining to the domain is saved. Note: If the directory does not already exist, it will be created. This directory should be solely dedicated to SmarterMail.

- Mailing List Username - The email address for which listserv commands are emailed.
- Domain Administrator Username - The identifier the domain administrator uses to login to SmarterMail. The domain administrator is responsible for adding and deleting email accounts, and setting specific configurations for the domain. Domain administrator accounts also have the ability to send and receive email, manage contacts, etc., just like a user account.
- Domain Administrator Password - The password associated to the domain administrator username.
- Disable Domain - Select this option to disable the domain. Disabled domains cannot send or receive email and users cannot login to the Web interface. This option is a good way to temporarily shut off a domain without deleting it.

Technical

Use this tab to specify the following technical settings:

- SMTP Port - The SMTP port used to connect to the email server. By default, the SMTP port is 25. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- SMTP Port (Alternate) - The SMTP port used to connect to the email server if an ISP restricts the standard port 25.
- Enabled - Check this box to enable the alternate SMTP port.
- POP Port - The POP port used to connect to the email server. By default, the POP port is 110. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- IMAP Port - The IMAP port used to connect to the email server. By default, the IMAP port is 143. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- LDAP Port - The LDAP port used to connect to the server. By default, the LDAP port is 389. Note: This is an Enterprise only feature. Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- Auto-responder Exclusions - To prevent the system from sending automated messages based on the spam level of the original message, select the appropriate option from the list.
- Forwarding Exclusions - To prevent the system from forwarding messages based on the spam level of the message, select the appropriate option from the list.
- Require SMTP Authentication - Select this option to require SMTP authentication when sending email. Note: If this option is enabled, users must provide an email address and

password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.

- Enable once per day per sender auto-responder restriction - Select this option to limit how frequently an auto-responder is sent.
- Disable greylisting - Select this option to disable greylisting.
- Enable users to opt out of LDAP listings - Select this option to allow users to remove themselves from the Global Address List.

Features

Use this tab to enable or disable the following features:

- Enable Active Directory integration - Select this option to enable active directory authentication.
- Enable calendar - Select this option to allow users to use the calendar feature.
- Enable catch-alls - Select this option to allow users to use catch-all email addresses.
- Enable contacts - Select this option to allow users to use the contacts feature.
- Enable content filtering - Select this option to allow users to use content filtering.
- Enable control of service access - Select this option to give users access to POP, IMAP, SMTP and Webmail services.
- Enable domain aliases - Select this option to allow domain administrator to create domain aliases.
- Enable domain reports - Select this option to provide additional reports for domain administrators.
- Enable file storage - Select this option to allow users to use the file storage feature.
- Enable email reports - Select this option to provide the ability to email reports.
- Enable IMAP retrieval - Select this option to allow users to download IMAP email from third-party mail servers.
- Enable mail signing - Select this option to enable email verification via mail signing.
- Enable mailing lists - Select this option to allow domain administrators to create and use mailing lists to send mass emails.
- Enable notes - Select this option to allow users to use the notes feature.
- Enable POP retrieval - Select this option to allow users to download POP email from third-party mail servers.
- Enable spam filtering - Select this option to allow domain administrators to override the spam filtering settings.
- Enable SyncML - Select this option to allow users to sync SmarterMail with Outlook, Thunderbird, and most smartphones using SyncML.

- Enable tasks - Select this option to allow users to use the tasks feature.
- Enable user reports - Select this option to provide reports for users.

Limits

Use this tab to specify the following limits:

- Disk Space - The maximum number of megabytes allocated for the domain. By default, the domain is allocated 500 MB of disk space. Note: When this limit is reached, SmarterMail will send a warning to the domain administrator and mailboxes on the domain will not be able to receive new mail.
- Domain Aliases - The maximum number of domain aliases allowed for the domain. By default, domains are limited to two aliases.
- Users - The maximum number of mailboxes allowed for the domain. By default, domains are limited to 100 users. Note: If your SmarterMail license limits the number of mailboxes allowed on the domain, this setting will be overridden.
- User Aliases - The maximum number of alias email accounts (forwarded to a true email account) allowed for the domain. By default, domains are limited to 1,000 user aliases.
- Mailing Lists - The maximum number of mailing lists allowed for the domain. By default, this setting is unlimited.
- POP Retrieval Accounts - The maximum number of POP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 POP email accounts.
- IMAP Retrieval Accounts - The maximum number of IMAP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 IMAP email accounts.
- Max Message Size - The maximum size email a user can send. By default, the max message size is 10,000 KB. Note: This number includes text, HTML, images, and attachments.
- Recipients per Message - The maximum number of recipients a message can have. By default, users can send messages to 200 email addresses.

Sharing

This tab is only available in SmarterMail Enterprise edition.

Use this tab to enable sharing of the following collaboration features:

- Enable Global Address List - Select this option to allow users on a domain to see all user profiles on the domain and participate in LDAP queries against the domain.
- Enable shared calendars - Select this option to allow calendars to be shared with other users on the domain.
- Enable shared contacts - Select this option to allow contact lists to be shared with other users on the domain.

- Enable shared folders - Select this option to allow email folders to be shared with other users on the domain.
- Enable shared notes - Select this option to allow notes to be shared with other users on the domain.
- Enable shared tasks - Select this option to allow task lists to be shared with other users on the domain.

Priority

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

The use of message delivery priorities also gives system administrators the ability to create automated actions based upon that priority. A common use would be to set up a separate specific outbound gateway to handle all mailing lists to avoid potential blacklisting of the primary IP and to efficiently deliver all messages. The system administrator could then assign all mailing lists a priority of 1, and would set up a gateway to handle only messages with a priority range of 1 to 1.

- Standard Messages - The priority level for messages that don't have another priority affecting it.
- Enabled - Check this box to enable priority settings for standard messages.
- Mailing Lists - The priority level for mailing list messages.
- Enabled - Check this box to enable priority settings for mailing list messages.
- Priority When Over Size - The priority level for messages that exceed the message size threshold.
- Enabled - Check this box to enable priority settings for messages that exceed the message size threshold.
- Message Size Threshold - The maximum size a message can be without triggering the Priority When Over Size rule..
- Auto-responders - The priority level for auto-responder messages.
- Enabled - Check this box to enable priority settings for auto-responders.
- Bounces - The priority level for non-delivery receipts.
- Enabled - Check this box to enable priority settings for bounced messages.
- Email Reports - The priority level for email reports.

- Enabled - Check this box to enable priority settings for email reports.
- Event Emails - The priority level for messages reminding users of upcoming events.
- Enabled - Check this box to enable priority settings for event emails.
- Priority After Attempt 1 - The priority level for messages that were not successfully sent after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt 1 Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt 1 is assigned to the message.
- Priority After Attempt 2 - The priority level for messages that were not successfully after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt 2 Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt 2 is assigned to the message.

Throttling

Throttling allows system administrators to limit the number of messages per hour and/or the amount of bandwidth used per hour to send messages. If the throttling threshold is reached, messages will stop sending for the remainder of the hour. Then the system will resume sending messages.

Use this tab to edit the following throttling settings:

- Outgoing Messages per Hour - The number of messages sent by the domain per hour. By default, the number of outgoing messages is 5,000.
- Enabled - Check this box to enable throttling for outgoing messages.
- Outgoing Bandwidth per Hour - The total number of MBs sent by the domain per hour. By default, the outgoing bandwidth is 100.
- Enabled - Check this box to enable throttling for bandwidth.
- Bounces Received per Hour - The number of non-delivery receipts a domain can receive per hour. By default, a domain can receive 1,000 bounces per hour.
- Enabled - Check this box to enable throttling for bounced messages.

Event Restrictions

Use this tab to enable the following event types and categories:

Alias

- Enable Alias Added event - Select this option to enable the Alias Added event type.
- Enable Alias Deleted event - Select this option to enable the Alias Deleted event type.

Collaboration

- Enable Calendar Reminder Occured event - Select this option to enable the Calendar Reminder event type.
- Enable Task Reminder Occured event - Select this option to enable the Task Reminder event type.

Email

- Enable Message Received event - Select this option to enable the Message Received event type.
- Enable Message Sent event - Select this option to enable the Message Sent event type.

Mailing List

- Enable Mailing List Added event - Select this option to enable the Mailing List Added event type.
- Enable Mailing List Deleted event - Select this option to enable the Mailing List Deleted event type.
- Enable Message Sent to Mailing List event - Select this option to enable the Message Sent to Mailing List event type.

Throttling

- Enable User Throttled event - Select this option to enable the User Throttled event type.
- Enable Domain Throttled event - Select this option to enable the Domain Throttled event type.

User

- Enable User Added Eevent - Select this option to enable the User Added event type.
- Enable User Deleted event - Select this option to enable the User Deleted event type.
- Enable User Disk Space Used event - Select this option to enable the User Disk Space event type.

Disabled Domains

System administrators can use this section to manage all of the domains in SmarterMail. To view all domains, click the manage icon and then click All Domains in the navigation pane. A list of domains will load in the content pane and the following columns will be available:

- **Checkbox** - Use these boxes to select multiple domains. Domains must be selected before choosing an action from the content pane toolbar.
- **Domain Name** - The name of the domain. For example, smartermail.com or example.com.
- **Size** - The amount of disk space used by all mailboxes on the domain.
- **File Storage** - The amount of disk space used for file storage on the domain.
- **Users** - The number of users (mailboxes) on the domain.
- **Aliases** - The number of alias addresses on the domain.
- **Mailing Lists** - The number of mailing lists on the domain.

In general, the following options are available from the content pane toolbar:

- **Edit** - Edits the settings for the selected domain.
- **Delete** - Permanently deletes the selected domain(s).
- **Manage** - Impersonates the domain administrator and give the system administrator access to all of the domain settings.

Disabling and Enabling Domains

To disable or re-enable a domain, select the desired domain and click Edit in the content pane toolbar. The domain settings will open in a popup window and the option to disable or enable the domain will be in the Options tab.

Spool

The email spool is a list of emails, in order of when they are created, that are available for the server to send or deliver locally. SmarterMail is multi-threaded, which means that if a message cannot process out of the queue, SmarterMail simply moves on to the next message until the maximum number of threads that are designated in the administrative configurations are in use. Administrators can use the information here to adjust threads and resources to allocate for concurrent messages.

Messages enter and leave the spool fairly quickly. In fact, some pass through so quickly that they will not display in the spool. Most messages in the spool are displayed because they are large, have many recipients, or are having trouble being sent to their final destination.

To view all of the messages in the spool, click the manage icon and expand the Spool in the navigation pane. Then click All Messages . To only view the messages waiting to be delivered, click the manage icon and expand the Spool in the navigation pane. Then click Waiting to Deliver .

In general the following columns are available:

- **Checkbox** - Use these boxes to select multiple messages. Messages must be selected before choosing an action from the content pane toolbar.

- File Name - The filename on the hard disk.
- Sender - The email address that initially sent the email.
- Size - The total size of the message on the hard drive, in kilobytes.
- Recipients - The number of delivered/total recipients.
- Time in Spool - The total amount of time the message has been in the spool.
- Attempts - The number of delivery attempts that have been made.
- Next Attempt - The date and time of the next delivery attempt.
- Status - The current status of the message.
- Spool Path - The spool the message resides in. If you have subspools enabled, the message may be placed in one of those locations.
- Priority - The priority level of the message.

The following actions are available from the content pane toolbar:

- Force - Clicking this button will allow the system administrator to push the message to the top of the spool. Note: The status of forced messages will not update until the server passes through the spool.
- Reset Retries - Clicking this button will allow the system administrator to reset the retry counts on all messages in the spool, effectively starting the delivery process over. This can be useful if a DNS or firewall problem has been recently resolved, or if you are using SmartHosting and the target server was down.
- View - Clicking this button will allow the system administrator to view selected message in a popup window.
- Recipients - Clicking this button will allow the system administrator to see who the message was sent to and the status of that message (i.e. delivered or pending).
- Priority - Clicking this button will allow the system administrator to change the priority level of a message.
- Delete - Clicking this button will allow the system administrator to delete messages from the spool. Note: No confirmation dialog will display, so use caution when deleting from the spool.
- Refresh - Clicking this button will allow the system administrator to update the page with the most recent contents of the spool.

User Activity

System administrators can use this section to monitor the activity of users on the server.

To view a list of users currently logged in to SmarterMail, click the manage icon . Then expand User Activity and click Online Users in the navigation pane. A list of users that are online will load in the content pane.

In general, system administrators can view the following attributes of online users:

- User - The name of the user.
- Type - The connection type. For example, IMAP or webmail.
- IP Address - This will tell the IP address of the user.
- Start Date - The start date and time of the connection.
- Duration - The length of the connection.

In general, the following options are available in the content pane toolbar:

- End Session - End the selected user's session.
- Disable User - Permanently disables the user from logging in to the system.
- Refresh - Refreshes the list of online users.

Inactive Users

To view a list of inactive users, click the manage icon . Then expand User Activity and click Inactive Users in the navigation pane. Then select whether you want to view users that have been inactive for 30 days, 90 Days, 6 months, or 12 months.

Current Connections

SmarterMail will monitor the server and see who is connecting via the different protocols—SMTP, IMAP, and POP. System administrators can then blacklist a certain user if they believe a user is making too many connections.

To view the current connections, click the manage icon and expand Current Connections in the navigation pane. Then click the appropriate connection type.

Current Blocks

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

System administrators can then click Delete in the content pane toolbar to remove anyone from the list.

Mass Messaging

SmarterMail gives system administrators the opportunity to send mass emails and reminders to selected groups.

Send Email

To send a mass email, click the manage icon . Then expand Mass Messaging in the navigation pane and click Send Email . The mass messaging options will load in the content pane and the following fields should be completed:

- From - The individual sending the email message. "System Administrator" will be entered as a default.
- To - Select the message recipients from the list. Note: If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.
- Subject - The subject of the email.
- Message - Type the text of the message in this field.

Once you complete all the fields, click the Send in the content pane toolbar to send the message.

Send Reminder

To send a mass email, click the manage icon . Then expand Mass Messaging in the navigation pane and click Send Reminder . The mass messaging options will load in the content pane and the following fields should be completed:

- To - Select the message recipients from the list. Note: If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.
- Subject - The subject of the email.
- Message - Type the text of the message in this field.

Once you complete all the fields, click the Send in the content pane toolbar to send the message.

Services

System administrators can use this section to enable and/or disable specific services on the mail server. Generally, all of these services should be enabled.

To view the status of the services, click the manage icon and then click Services in the navigation pane. The list of available services will load in the content pane and the following columns will be available:

- Checkbox - Use these boxes to select multiple services. Services must be selected before choosing an action from the actions toolbar.
- Status Indicator - The status indicator, or the colored ball next to the checkbox, shows the

current status of the service.

- Description - A brief summary of the service.

The following options will be available in the content pane toolbar:

- Start - Enables the service.
- Stop - Disables the service.

Services

In general, system administrators can enable/disable the following services:

- IMAP - A client/server protocol in which email is received and held by the mail server. IMAP requires continual access to the client during the time that it is working with the mail server.
- IMAP Retrieval - With IMAP retrieval, mail is retrieved from external IMAP servers and saved in a mailbox on the mail server.
- LDAP (Enterprise Edition Only) - A communication protocol for accessing online directory services. Programs like Outlook and Thunderbird use LDAP to retrieve contact lists from SmarterMail. SmarterMail will validate email addresses for user accounts, aliases, and mailing lists.
- POP - An email protocol in which mail is saved in a mailbox on the mail server. When the end user reads the mail, it is immediately downloaded to the client computer and is no longer maintained on the mail server.
- POP Retrieval - With POP retrieval, mail is retrieved from external POP3 servers and saved in a mailbox on the mail server.
- SMTP - A TCP/IP (Internet) protocol used for sending and receiving e-mail. However, since it's limited in its ability to queue messages at the receiving end, it's usually used with one of two other protocols, POP or IMAP, that let the user save messages in a server mailbox and download them periodically from the server. In other words, users typically use a program that uses SMTP for sending e-mail and either POP or IMAP for receiving messages from their local server.
- Spool - The internal message queue used to deliver messages locally and to remote services.

View Logs

System administrators can use this section to quickly view the server's log files. To view logs, click the manage icon and click View Logs in the navigation pane. The following options will be available in the content pane:

- Date - The date of the log files you want to view.
- Type - Select the type of log file (or the delivery method of the files) that you would like to

view.

- Search String - Type the words or phrases to that should be contained in the log files.
- Enable related traffic - Select this option to only display data that occurred within the same session.

To search for a specific log, complete the Date, Type, and Search String fields. Then click Search in the content pane. Any matching log files will display in the content pane. Note: SmarterMail will show logs files up to 1MB.

Alternatively, system administrators can download the log file by clicking Download in the content pane toolbar. This page allows administrators to get quick access to a domains log files.

Administrators can view log files by utilizing this page, or they can download the selected log file as a .zip file by clicking Download in the content pane toolbar.

Message Archive Search

This feature is only available to domain and system administrators using SmarterMail Enterprise.
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Message archiving is a method of storing all email traffic for a domain in a separate location on the mail server. Typically, this is a feature used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002.

To search the archive, click the manage icon and click Message Archive Search in the navigation pane. System administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

Domain administrators can also search the archive by clicking email icon and clicking Message Archive Search in the navigation pane.

For more information on archiving, see [Message Archiving](#) .

Indexing Status

SmarterMail Search Indexing allows users to instantly find any files--including messages, attachments, appointment, contacts, tasks, or notes--in their mailbox. Following the initial scan of the server, SmarterMail continually monitors each user's mailbox for changes and updates the index. This method of indexing reduces server utilization while increasing the speed in which search results are returned.

System administrators can use this section to view the status of SmarterMail Search Indexing.

Viewing the status of indexing can be beneficial when troubleshooting a problem. For example, if the

mail service seems to be using a large amount of CPU, the system administrator can check to see if the cause of the temporary increase in CPU usage is due to indexing.

To view the indexing status, click the manage icon and click Indexing Status in the navigation pane. A list of users being indexed (or queued for indexing) will load in the content pane.

Reports

Reports Overview

System administrators, domain administrators, and individual users can use real-time mail server statistics, historical summary reporting, and detailed trend analysis at the system, domain, and user levels to understand the performance of their systems. With dozens of pre-defined reports, SmarterMail provides critical statistics that help system and domain administrators monitor their systems.

For more information, see the Reports folder of the Help for Users section of the online help.

Events

Events Overview

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For more information, see the Events folder of the Help for Users section of the online help.

Settings

General Settings

To access the general settings for SmarterMail server, click the settings icon and click General Settings in the navigation pane. The general settings will load and the following tabs will be available:

Use this tab to specify the following settings:

- Username - The system administrator login name.
- Old Password - In order to change the system administrator password, you must type the current password associated with the system administrator account in this field. Passwords are case-sensitive.
- New Password - Type the desired password for the system administrator account in this field. Passwords are case-sensitive.

- **Confirm New Password** - Verify the desired password for the system administrator account. Passwords are case-sensitive.
- **Items per Page** - The number of items will display on each page within SmarterMail.
- **Enable Login Access by IP Address** - Select this checkbox to restricts logins to the system administrator account by IP address.
- **Enable Lite Mode** - SmarterMail Lite is a specially-developed version of the SmarterMail mail server that provides unlimited email accounts and domains and it is only available with specific product offerings from SmarterTools technology partners. If SmarterMail detects software from a company that has partnered with SmarterTools to make this edition available, SmarterMail Lite will automatically be enabled. Because SmarterMail Lite has a limited feature set, some customers may want to revert to SmarterMail Free edition. To do so, uncheck this box. Note: SmarterMail Free edition has the same functionality as SmarterMail Enterprise, but is limited to one domain with up to 10 users.

Login Access

Use this tab to specify the IP addresses from which the system administrator can login. Note: This tab is only available if the system administrator has enabled login access by IP address in the Administrator tab. --%>

Server Info

Use this tab to specify the following server settings:

- **Hostname** - The hostname of the server. Note: Hostnames should be in the format `computername.domain.com`.
- **Postmaster Mailbox** - The email address for the postmaster. This is usually the owner or system administrator.
- **IP of Primary DNS** - The IP address of the primary DNS server. If left blank, the DNS server information will be pulled from the the Windows Networking settings (recommended).
- **IP of Secondary DNS** - Enter the IP address of the secondary DNS server. If left blank, the DNS server information will be pulled from the the Windows Networking settings (recommended).
- **Logout URL** - The URL to which users are redirected upon logout.
- **Enabled** - Select this checkbox to redirect users to the Logout URL after logging out of SmarterMail.
- **Enable domain admins to override logout URL** - Select this option to allow domain administrators to specify the Logout URL. If this option is not enabled, it will not be visible to domain administrators.

- **Enable Lite Mode** - SmarterMail Lite is a specially-developed version of the SmarterMail mail server that provides unlimited email accounts and domains and it is only available with specific product offerings from SmarterTools technology partners. If SmarterMail detects software from a company that has partnered with SmarterTools to make this edition available, SmarterMail Lite will automatically be enabled. Because SmarterMail Lite has a limited feature set, some customers may want to revert to SmarterMail Free edition. To do so, uncheck this box. Note: SmarterMail Free edition has the same functionality as SmarterMail Enterprise, but is limited to one domain with up to 10 users.
- **Reset getting started** - Select this checkbox to view the Getting Started checklist. This checklist is designed to system administrators set up the mail server and appears automatically after installation. However, system administrators may choose to refer to the checklist at a later time as a reference guide when adding additional domains or users.

Spool

Use this tab to specify the following spool settings

- **Spool Path** - The full path in which messages are stored prior to delivery. If you are using a real-time virus scanner, this is the path that must be scanned in order to properly handle viruses.
- **SubSpools** - SubSpools are within the spool path and allow SmarterMail to work around the NTFS limitation of 30,000 objects in an individual folder. SmarterMail will utilize subspools by allocating up to 10,000 messages per subpool. (Default is 10)
- **Delivery Delay** - This number of seconds mail will be held in the spool before it is delivered. A delivery delay is beneficial when you are running a secondary service (such as a virus checker) that needs access to messages prior to delivery, as it provides ample time for the secondary service to interact with the message. By default, the delivery delay is 15 seconds.
- **Retry Intervals** - When the mail server is unable to contact the receiving server, the email attempting to be sent is held for a period of time before attempting to be resent. This is the time between retries. Users can specify multiple retry attempts to resend emails before it is bounced. By default, this is set to 4 attempts - at 15 min, 30 min, 60 min, and 90 min intervals.
- **Attempts before bouncing DNS errors** - The maximum number of attempts SmarterMail should make before the message is bounced due to a DNS error. The most common cause of a DNS error is a misspelled domain. Limiting the number of attempts before DNS errors are bounced is beneficial because messages will not sit in the queue for long periods of time processing unnecessary messages and possibly slowing the system down. This will be helpful to users because messages will be bounced sooner and will give users the opportunity to fix any mistakes and get a message resent. By default, the server will make 2 attempts. Note: Setting this at 1 retry can be dangerous if the DNS server fails or if there is a loss of Internet connectivity. To disable this feature, set the number of bounces equal to the number of retry

intervals.

- **Command-Line File** - Enable this and enter the full path to an executable you wish to use to process incoming messages. Use %filepath as an argument to pass the path of the email file to the executable. It is allowable for the executable to delete the message to prevent delivery. Example: If you set this field to "c:\program files\myexe.exe %filepath", the program myexe.exe will be launched with the full path to the spool file as its first argument. Note: The command will not be executed if the Enabled box is not checked.
- **Command-Line Timeout** - The number of seconds that the server will wait for information from the remote server. In general, a timeout of 5 seconds should suffice.

Reports

Use this tab to specify the following settings:

- **Delete Server Stats After** - The number of months that the server stats will be deleted. By default, the server stats are deleted after 13 months.
- **Enabled** - Select this checkbox to delete server stats after the specified time period.
- **Delete Domain Stats After** - The number of months that the domain stats will be deleted. By default, the domain stats are deleted after 13 months.
- **Enabled** - Select this checkbox to delete domain stats after the specified time period.
- **Delete User Stats After** - The number of months that the user stats will be deleted. By default, the user stats are deleted after 13 months.
- **Enabled** - Select this checkbox to delete user stats after the specified time period.

Indexing

Use this tab to specify the following settings:

- **Max Threads** - The maximum number of threads to use for search indexing. Increasing this value will cause SmarterMail to use more CPU, but will allow the system to index more users simultaneously.
- **Segment Count Before Optimizing** - The number of segment counts in an index before the index is reorganized. Increasing this number will increase file counts per mailbox, but will use less CPU.
- **Items Before Garbage Collection** - The number of indexed items across the server before freeing as much memory as possible. Increasing this number will increase memory usage and lower CPU usage.
- **Items to Index Per Pass** - The number of items to index per user per index attempt. Increasing this number will increase memory usage and decrease the time it takes to index one user.

However, it will increase the length of time it takes to index many small users if there are a few large users.

- **Seconds In Queue Before Indexing** - The amount of time a user must be in the indexing queue before being indexed. This setting provides a buffer for many changes to a mailbox to ensure the same user is not indexed multiple times. Increasing this number will cause search results to be delayed further, but will result in indexing heavier users less frequently.
- **Deleted Items Before Indexing** - The number of items that will be removed from the index before an optimization will occur. Increasing this number will slow search results. Decreasing this number will increase CPU and disk usage, but will increase search result speed.

System Administrators

SmarterMail allows a single installation to have multiple system administrator logins, each with their own unique login and password. To view a list of system administrator accounts, click the settings icon and click System Administrators in the navigation pane. A list of users with system administrator access will load in the content pane and the following options will be available in the content pane toolbar:

- **New** - Creates a new system administrator account.
- **Edit** - Edits the selected system administrator account.
- **Delete** - Permanently deletes the selected system administrator account(s).

Creating New System Administrators

To create a new system administrator account, click **New** in the content pane toolbar. The system administrator settings will load in a popup window and the following tabs will be available:

Options

Use this tab to specify the following settings:

- **Username** - The identifier the user uses to login to SmarterMail.
- **New Password** - The corresponding password used to login to Smartermail.
- **Confirm New Password** - The corresponding password used to login to Smartermail.
- **Description** - A brief description of the administrator. For example, for support department.
- **Enable login access by IP address** - Select this option to only allow system administrators to login from certain IP addresses.

Login Access

Use this tab to specify the IP address or IP range from which system administrators can login to

SmarterMail from. Note: This tab is only accessible if the option to enable login access by IP address was selected in the Options tab.

Protocol Settings

To access the settings for standard email protocols, click the settings icon and click Protocol Settings in the navigation pane. The protocol settings will load and the following tabs will be available:

POP

Use this tab to specify the following POP settings:

- POP Banner - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:
 - #HostName# - The hostname of the IP address to which the connection is made.
 - #ConnectedIP# - The IP address of the remote computer.
 - #Time# - The system's local time.
 - #TimeUTC# - The time in UTC.
 - #UnixTime# - The number of seconds since January 1, 1970.
- Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of minutes, the command will be aborted. By default, the command times out after 5 minutes.
- Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 500.
- POP Retrieval Download Path - The path in which mail is stored from POP accounts until it is read.
- Max POP Retrieval Threads - The maximum number of threads you want SmarterMail to work on concurrently. By default, the maximum number of POP retrieval threads is 10.
- POP Retrieval Interval - The frequency by which SmarterMail checks for new POP messages. By default, the POP retrieval interval is 1 minute.

IMAP

Use this tab to specify the following IMAP settings:

- IMAP Banner - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:
 - #HostName# - The hostname of the IP address to which the connection is made.
 - #ConnectedIP# - The IP address of the remote computer.
 - #Time# - The system's local time.
 - #TimeUTC# - The time in UTC.
 - #UnixTime# - The number of seconds since January 1, 1970.
- Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of minutes, the command will be aborted. By default, the command times out after 15 minutes.
- Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 1000.
- IMAP Retrieval Download Path - The path in which mail is stored from IMAP accounts until it is read.
- Max IMAP Retrieval Threads - The maximum number of threads you want SmarterMail to work on concurrently. By default, the maximum number of POP retrieval threads is 10.
- IMAP Retrieval Interval - The frequency by which SmarterMail checks for new POP messages. By default, the POP retrieval interval is 10 minutes.
- Enable IDLE Command - Select this checkbox to enable IMAP IDLE. IMAP idle is an extension of the IMAP protocol that allows a mail server to send status updates in real time. Through IMAP IDLE, users can maintain a connection with the mail server via any mail client that supports IMAP IDLE, allowing them to be instantly aware of any changes or updates. When enabled, SmarterMail will inform any connecting IMAP client that it accepts the IDLE command. Note: IMAP clients that do not fully support IMAP IDLE, like Microsoft Outlook, may use the command in such a way that it actually hinders performance.

LDAP

Use this tab to specify the following LDAP settings:

- Session Timeout - After a connection fails to respond or issue new commands for this number of seconds, the connection will be closed. By default, the session times out after 300 seconds.
- Command Timeout - If the server receives a command that sends large amounts of data and

the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 120 seconds.

SMTP In

Use this tab to specify the following incoming SMTP settings:

- SMTP Banner - The text that is displayed when initially connecting to the port. The banner supports the use of the following variables, which will be replaced with their corresponding values:
 - #HostName# - The hostname of the IP address to which the connection is made.
 - #ConnectedIP# - The IP address of the remote computer.
 - #Time# - The system's local time.
 - #TimeUTC# - The time in UTC.
 - #UnixTime# - The number of seconds since January 1, 1970.
- Allow Relay - If you are concerned about spam mailers using the relay function to send mail through your server or do not want any other mail server to use your SMTP server as a gateway, you can set the type of relays you will allow, or completely disallow mail relay completely.
- Nobody - Restricts sent mail to only work via SMTP authentication and with accounts on the local SmarterMail Server (except for IPs on the White List).
- Only Local Users - Limits relay access to users (email accounts) for a valid domain on your SmarterMail Server.
- Only Local Domains - Limits relay access only to mail hosts (domains) on your SmarterMail Server.
- Anyone - Allows any other mail server to pass messages through your mail server, increasing the chances of your mail server being used for sending large volumes of messages with domains not associated with your local mail server. Selecting this option turns off statistics for all domains, due to the high amount of messages that are passed through the mail server with an open relay.
- Session Timeout - After a connection fails to respond or issue new commands for this number of seconds, the connection will be closed. By default, the session times out after 15 minutes.
- Enabled - Select this checkbox to enable the session timeout setting.
- Command Timeout - If the server receives a command that sends large amounts of data and the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 120 seconds.
- Max Bad Commands - After this many unrecognized or improper commands, a connection will be automatically terminated. By default, the maximum number of bad commands is 8.
- Max Connections - Some protocols in SmarterMail allow you to specify the maximum number

of connections. Increasing this value allows SmarterMail to handle more connections of that type at once, but results in higher CPU and memory utilization. By default, the maximum number of connections is 1000.

- Max Hop Count - After a message gets delivered through this many mail servers, it is aborted by the software. This prevents looping due to DNS problems or misconfigurations. By default the max hop count is 20.
- Max Message Size - Messages greater than this size will be rejected by the mail server. By default, the max message size is 0 (unlimited).
- Max Bad Recipients - After this many bad recipients, the SMTP session will be terminated. This setting allows you to better protect yourself against email harvesting attacks. A value of 20 is recommended in most cases.
- Submission IP:Port - The submission port is a special SMTP port that requires SMTP Authentication in order to be used to deliver any mail whatsoever, regardless of domain-specific settings. This setting is an advanced feature that is typically used when a whitelisted inbound gateway is being used for spam and virus scanning and all other SMTP traffic is blacklisted. Note: This setting will not function until the Enabled checkbox next to the setting is checked.
- Enable VRFY command - Select this checkbox to allow others (including other mail servers) to verify an email address on the server. Note: Some people believe enabling VRFY commands is a security risk, so be sure to research the possible ramifications before enabling this feature.
- Enable EXPN command - Select this checkbox to allow others to list all users associated with an alias or list. Note: Some people believe enabling EXPN commands is a security risk, so be sure to research the possible ramifications before enabling this feature.
- Disable relay settings when using SMTP authentication - Select this checkbox to disable the "Allow Relay" setting from above.
- Enable Domain's SMTP auth setting for local deliveries - Select this checkbox to enforce SMTP authentication for all local deliveries. For example, mail from user1@example.com to user2@example.com must be authenticated even though the message is bound for local delivery.
- Disable AUTH LOGIN method for SMTP authentication - Select this checkbox to disable plain text authentication.

SMTP Out

Use this tab to specify the following outgoing SMTP settings:

- Outbound IP - Select the IP address that is used to deliver outbound messages from the list.
- Enable fallback to Primary IP on failure - Select this checkbox to have SmarterMail automatically fallback to the primary IP when a failure has occurred. SmarterMail will only attempt to connect once if this option is enabled.

- **Command Timeout** - If the server receives a command that sends large amounts of data and the data stops coming in for this number of seconds, the command will be aborted. By default, the command times out after 60 seconds.
- **Max Spam Check Threads** - The maximum number of messages that can be spam checked at one time. By default, the maximum spam check threads is 30.
- **Max Delivery Threads** - The maximum number of messages that can be sent at one time to email addresses that are not on the local server. If a message cannot be sent, the SmarterMail server's multi-threading capabilities will move on to the next message and eventually get back to the one it skipped. This action can save tremendous amounts of time when compared to some other mail servers that stall the spool if a message cannot be sent right away. By default, the max delivery threads is 50.
- **Enable DNS Caching** - Select this checkbox to cache the results of DNS calls in SmarterMail.
- **Enable TLS if supported by the remote server** - Select this checkbox to use TLS (SSL encryption) if the server you are connected to supports it.

ActiveSync Mailboxes

System administrators will use this section to enable and disable the Microsoft Exchange ActiveSync add-on for mailboxes. Note: Before you can configure a mailbox to sync using the ActiveSync technology, you must activate the ActiveSync add-on. For more information, please refer to the KB article [How To - Activate Microsoft Exchange ActiveSync](#).

To access this section, click the settings icon and click ActiveSync Mailboxes in the navigation pane. A list of accounts for which the Exchange ActiveSync add-on is enabled will load in the content pane.

In general, the following columns are available:

- **Checkbox** - Use these boxes to select multiple mailboxes. Mailboxes must be selected before choosing an action from the actions toolbar.
- **Email Address** - The email address of the SmarterMail user.

The following options are available from the actions toolbar:

- **Add** - Adds Exchange ActiveSync to a mailbox on the domain.
- **Delete** - Removes Exchange ActiveSync from the selected mailbox.
- **Search** - Searches for a specific mailbox with Exchange ActiveSync enabled.

File Storage

SmarterMail's file storage feature allows users to upload files to the server and share them via public links. One benefit of using file storage is that it reduces the stress on the server by keeping large files

out of the spool. Note: Files uploaded to the server are counted toward the user's disk space allocation, so system administrators should encourage users to delete files that are no longer used from the server when possible.

To manage the file storage settings, click the settings icon and click File Storage in the navigation pane. The file storage settings will load in the content pane and the following tabs will be available:

Options

use this tab to specify the following settings:

- Max File Size - The maximum size in KB of any file uploaded to the server.
- Enabled - Select this option to enable the max file size setting.

Extension Blacklist

Use this tab to list any file types that cannot be uploaded to the server.

Hostnames

This feature allows administrators to assign a hostname for each IP address. For example: IP 1.1.1.1 can be assigned to mail.domain1.com and IP 1.1.1.2 can be for mail.domain2.com.

To view hostnames, click the manage icon and click Hostnames in the navigation pane. A list of hostnames will load in the content pane and the following options will be available from the content pane toolbar:

- New - Creates a new hostname.
- Delete - Deletes the selected hostname(s).

Notification Profiles

SmarterMail can detect events as they occur, generate messages for those events, and deliver the messages to system administrators and agents that need the information. For example, users can receive notifications when a task is due or system administrators can receive notifications when the disk space for a domain reaches a certain percentage. Notification profiles determine how those messages are sent.

Although users can set up their own notification profiles, some organizations may find it beneficial to create a notification profile that applies to all system administrators. You can use this page to do so.

To view a list of notification profiles, click the settings icon and click Notification Profiles in the navigation pane. Your notification profiles will load in the content pane.

The following columns are available:

- **Checkbox** - Use these boxes to select multiple profiles. Notification profiles must be selected before choosing an action from the content pane toolbar.
- **Notification Profile Name** - The name of the profile.
- **Type** - The types of notification enabled for the selected profile.

The following options are available from the content pane toolbar:

- **New** - Creates a new notification profile.
- **Edit** - Edits an existing notification profile.
- **Delete** - Permanently deletes the selected notification profile(s).

To view a specific notification profile, simply double-click the appropriate profile. The profile will load in the content pane and the following fields will be available:

- **Notification Profile Name** - The name of the profile.
- **Email Address(es)** - The email address(es) to which notifications are sent.
- **Enable** - Select this option to enable email notifications.
- **SMS Email Address(es)** - The mobile device email address to which notifications are sent.
- **Enable** - Select this option to enable SMS notifications.
- **Enable Reminders for all domain administrators** - Select this option to send a reminder to all domain administrators when the event is triggered.

Skins

SmarterMail supports custom skinning, so administrators can create skins that represent their own style or emulate the company's branding and appearance. For more information on skinning, refer to the skinning guide available for download on the SmarterMail Resources page of the SmarterTools website.

To view the skin settings, click the settings icon and click Skins in the navigation pane. The following skin settings will load in the content pane:

- **Default Skin** - Select the skin to use as the default from the list.
- **Enable ability for domains to override skin** - Select this option to allow domain administrators to choose a skin for their domain

Log Settings

System administrators can use this section to manage how logs are written and how much detail is included in logs.

To access the log settings, click the settings icon and click Log Settings in the navigation pane. The log settings will load in the content pane and the following tabs will be available:

Log Files

Use this tab to specify the following settings:

- Log Path - The default location for the Logs that email messages in SmarterMail produce. If you would like to change the default location, enter a new path here.
- Delete Log Files After - The number of days after which log files are automatically deleted.
- Enabled - Select this option to allow log files to be deleted after a specific number of days.

Log Detail Levels

Use this tab to specify how detailed the logs should be:

- Exceptions Only - Small size logs that record only errors.
- Normal - Medium size logs that record most activity taken on the mail server.
- Detailed - Very detailed logs that can get very large. Only enable this option when asked to by SmarterTools Support, or when troubleshooting server operations.

Note: More detailed logs require more disk space. If you choose a detailed log, you may want to enable the auto-delete setting on the Log Files tab.

System administrators can apply these settings to the following log file types:

- ActiveSync Level - The log level for Exchange ActiveSync connections.
- Delivery Log Level - The log level for message delivery and spool operations.
- IMAP Log Level - The log level for IMAP sessions.
- IMAP Retrieval Log Level - The log level for IMAP retrieval sessions.
- LDAP Log Level - The log level for LDAP sessions.
- Message-ID Log - The log level for logging Message-ID's of all messages sent to mailing lists.

- Event Log - The log level for event sessions.
- SyncML Log Level - The log level for SyncML sessions.
- POP Log Level - The log level for POP sessions.
- POP Retrieval Log Level - The log level for POP retrieval sessions.
- SMTP Log Level - The log level for SMTP sessions.

Note: By default, SmarterMail sets all log detail levels to exceptions only.

Defaults

Domain Defaults

Use this section to create global default settings that will be applied to new domains created through the Web interface or Web services. These default settings can be overwritten and are only intended to avoid needless data entry. Note: Modifications to these settings will not affect existing domains.

To access the domain default settings, click the settings icon . Then expand the Defaults folder and click Domain Defaults in the navigation pane. The domain default settings will load in the content pane and the following tabs will be available:

Technical

Use this tab to specify the following technical settings:

- Folder Path - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved.
- SMTP Port - The SMTP port used to connect to the email server. By default, the SMTP port is 25. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- SMTP Port (Alternate) - The SMTP port used to connect to the email server if an ISP restricts the standard port 25.
- Enabled - Check this box to enable the alternate SMTP port.
- POP Port - The POP port used to connect to the email server. By default, the POP port is 110. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- IMAP Port - The IMAP port used to connect to the email server. By default, the IMAP port is 143. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- LDAP Port - The LDAP port used to connect to the server. By default, the LDAP port is 389. Note: This is an Enterprise only feature. Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- Auto-responder Exclusions - To prevent the system from sending automated messages based on the spam level of the original message, select the appropriate option from the list.
- Forwarding Exclusions - To prevent the system from forwarding messages based on the spam level of the message, select the appropriate option from the list.
- Require SMTP Authentication - Select this option to require SMTP authentication when

sending email. Note: If this option is enabled, users must provide an email address and password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.

- Enable once per day per sender auto-responder - Select this option to limit how frequently an auto-responder is sent.
- Disable greylisting - Select this option to disable greylisting.
- Enable users to opt out of LDAP listings - Select this option to allow users to remove themselves from the Global Address List.

Features

Use this tab to enable or disable the following features:

- Enable calendar - Select this option to allow users to use the calendar feature.
- Enable catch-alls - Select this option to allow users to use catch-all email addresses.
- Enable contacts - Select this option to allow users to use the contacts feature.
- Enable content filtering - Select this option to allow users to use content filtering.
- Enable control of service access - Select this option to allow the domain administrator to restrict access to certain services.
- Enable domain aliases - Select this option to allow the domain administrator to create domain aliases.
- Enable domain reports - Select this option to provide additional reports for domain administrators.
- Enable email reports - Select this option to provide the ability to email reports.
- Enable IMAP retrieval - Select this option to allow users to download IMAP email from third-party mail servers.
- Enable mail signing - Select this option to enable email verification via mail signing.
- Enable mailing lists - Select this option to allow the domain administrator to create and use mailing lists to send mass emails.
- Enable notes - Select this option to allow users to use the notes feature.
- Enable POP retrieval - Select this option to allow users to download POP email from third-party mail servers.
- Enable spam filtering - Select this option to allow the domain administrator to override the spam filtering settings.
- Enable SyncML - Select this option to allow users to sync SmarterMail with Outlook, Thunderbird, and most smartphones using SyncML.
- Enable tasks - Select this option to allow users to use the tasks feature.
- Enable user reports - Select this option to provide reports for users.

Limits

Use this tab to specify the following limits:

- **Disk Space** - The maximum number of megabytes allocated for the domain. By default, the domain is allocated 500 MB of disk space. Note: When this limit is reached, SmarterMail will send a warning to the domain administrator and mailboxes on the domain will not be able to receive new mail.
- **Domain Aliases** - The maximum number of domain aliases allowed for the domain. By default, domains are limited to two aliases.
- **Users** - The maximum number of mailboxes allowed for the domain. By default, domains are limited to 100 users. Note: If your SmarterMail license limits the number of mailboxes allowed on the domain, this setting will be overridden.
- **User Aliases** - The maximum number of alias email accounts (forwarded to a true email account) allowed for the domain. By default, domains are limited to 1,000 user aliases.
- **Mailing Lists** - The maximum number of mailing lists allowed for the domain. By default, this setting is unlimited.
- **POP Retrieval Accounts** - The maximum number of POP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 POP email accounts.
- **IMAP Retrieval Accounts** - The maximum number of IMAP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 IMAP email accounts.
- **Max Message Size** - The maximum size email a user can send. By default, the max message size is 10,000 KB. Note: This number includes text, HTML, images, and attachments.
- **Recipients per Message** - The maximum number of recipients a message can have. By default, users can send messages to 200 email addresses.

Sharing

This tab is only available in SmarterMail Enterprise edition.

Use this tab to enable sharing of the following collaboration features:

- **Enable Global Address List** - Select this option to allow users on a domain to see all user profiles on the domain and participate in LDAP queries against the domain.
- **Enable shared calendars** - Select this option to allow calendars to be shared with other users on the domain.
- **Enable shared contacts** - Select this option to allow contact lists to be shared with other users on the domain.
- **Enable shared folders** - Select this option to allow email folders to be shared with other users on the domain.

- Enable shared notes - Select this option to allow notes to be shared with other users on the domain.
- Enable shared tasks - Select this option to allow task lists to be shared with other users on the domain.

Priority

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

The use of message delivery priorities also gives system administrators the ability to create automated actions based upon that priority. A common use would be to set up a separate specific outbound gateway to handle all mailing lists to avoid potential blacklisting of the primary IP and to efficiently deliver all messages. The system administrator could then assign all mailing lists a priority of 1, and would set up a gateway to handle only messages with a priority range of 1 to 1.

- Standard Messages - The priority level for messages that don't have another priority affecting it.
- Enabled - Check this box to enable priority settings for standard messages.
- Mailing Lists - The priority level for mailing list messages.
- Enabled - Check this box to enable priority settings for mailing list messages.
- Priority When Over Size - The priority level for messages that exceed the message size threshold.
- Enabled - Check this box to enable priority settings for messages that exceed the message size threshold.
- Message Size Threshold - The maximum size a message can be without triggering the Priority When Over Size rule.
- Auto-responders - The priority level for auto-responder messages.
- Enabled - Check this box to enable priority settings for auto-responders.
- Bounces - The priority level for non-delivery receipts.
- Enabled - Check this box to enable priority settings for bounced messages.
- Email Reports - The priority level for email reports.
- Enabled - Check this box to enable priority settings for email reports.
- Event Emails - The priority level for messages reminding users of upcoming events.

- Enabled - Check this box to enable priority settings for event emails.
- Priority After Attempt X - The priority level for messages that were not successfully sent after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt 1 Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt 1 is assigned to the message.
- Priority After Attempt Y - The priority level for messages that were not successfully sent after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt 2 Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt 2 is assigned to the message.

Throttling

Throttling allows system administrators to limit the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. If the throttling threshold is reached, messages will stop sending for the remainder of the hour. Then the system will resume sending messages.

Use this tab to edit the following throttling settings:

- Outgoing Messages per Hour - The number of messages sent by the domain per hour. By default, the number of outgoing messages is 5,000.
- Enabled - Check this box to enable throttling for outgoing messages.
- Outgoing Bandwidth per Hour - The total number of MBs sent by the domain per hour. By default, the outgoing bandwidth is 100.
- Enabled - Check this box to enable throttling for bandwidth.
- Bounces Received per Hour - The number of non-delivery receipts a domain can receive per hour. By default, a domain can receive 1,000 bounces per hour.
- Enabled - Check this box to enable throttling for bounced messages.

Event Restrictions

Use this tab to enable the following event types and categories:

Alias

- Enable Alias Added Event - Select this option to enable the Alias Added event type.
- Enable Alias Deleted Event - Select this option to enable the Alias Deleted event type.

Collaborate

- Enable Calendar Reminder Occured Event - Select this option to enable the Calendar Reminder event type.
- Enable Task Reminder Occured Event - Select this option to enable the Task Reminder event type.

Email

- Enable Message Received Event - Select this option to enable the Message Received event type.
- Enable Message Sent Event - Select this option to enable the Message Sent event type.

Mailing List

- Enable Mailing List Added Event - Select this option to enable the Mailing List Added event type.
- Enable Mailing List Deleted Event - Select this option to enable the Mailing List Deleted event type.
- Enable Message Sent to Mailing List Event - Select this option to enable the Message Sent to Mailing List event type.

Throttling

- Enable User Throttled Event - Select this option to enable the User Throttled event type.
- Enable Domain Throttled Event - Select this option to enable the Domain Throttled event type.

User

- Enable User Added Event - Select this option to enable the User Added event type.
- Enable User Deleted Event - Select this option to enable the User Deleted event type.
- Enable User Disk Space Used Event - Select this option to enable the User Disk Space event type.

Domain Propagation

Use this section to apply global default settings to all of the domains on the server. These default settings can be overwritten and are only intended to avoid needless data entry.

To access domain propagation, click the settings icon . Then expand the Defaults folder and click Domain Propagation in the navigation pane. The default domain settings will load in the content pane. For more information on these settings, refer to Domain Defaults .

To apply some or all of the default settings to all of the domains on your server, select the appropriate settings and click Propagate Now .

User Defaults

Use this section to create global default settings that will be applied to new users created through the Web interface or Web services. These default settings can be overwritten and are only intended to avoid needless data entry. Note: Modifications to these settings will not affect existing users.

To access the user default settings, click the settings icon . Then expand the Defaults folder and click User Defaults in the navigation pane. The domain default settings will load in the content pane. For more information on these settings, refer to Users .

User Propagation

Use this section to apply global default settings to all of the users on the domain. These default settings can be overwritten and are only intended to avoid needless data entry.

To access user propagation, click the settings icon . Then expand the Defaults folder and click User Propagation in the navigation pane. The default domain settings will load in the content pane. For more information on these settings, refer to Users .

To apply some or all of the default settings to all of the users on the domain, select the appropriate settings and click Propagate Now .

Folder Auto-clean

Folder Auto-clean is a method for limiting how much of a user's disk space is used by the Junk E-Mail, Sent Items, and Deleted Items folders. By placing limits on the size of these folders, domain administrators can help ensure that user accounts do 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 access the folder auto-clean settings, click the settings icon . Then expand the Defaults folder and click Folder Auto-Clean in the navigation pane.

The folder auto-clean settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following options:

- Enable domains to override auto-clean settings - Select this option to allow domain administrators to create their own auto-clean policies.

- Enable users to auto-clean inbox - Select this option to allow users to create their own auto-clean policies.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab. If you chose to override the settings, you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

These options will be visible if size is chosen:

- Folder Size Before Auto-clean - The maximum size of the folder. Once the folder reaches this size, the auto-clean process is started and older messages (messages that were received the longest time ago) are deleted.
- Folder Size After Auto-clean - The goal size of the folder. When auto-cleaning, SmarterMail will delete older messages until the folder reaches this size. Note: This number should always be lower than the "before" number.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

These options will be visible if date is chosen:

- Mail Age - The maximum number of days mail will stay in the selected folder before deletion.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Routing

Forwarding Blacklist

Emails cannot be forwarded to the domains in this list. This is to prevent issues with companies that have strict spam policies and blacklist the sending server for forwarded spam.

This feature is commonly used for AOL, which blacklists servers that forward spam to their servers. If this becomes a problem, you may decide to add AOL.com to your forwarding blacklist.

Message Archiving

This feature is only available in SmarterMail Enterprise edition.

Message archiving is a method of storing all email traffic for a domain in a separate location on the mail server. Typically, this is a feature used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002.

By default, SmarterMail does not archive any messages. To specify which domains on the SmarterMail are archived, the system administrator will need to create archiving rules.

To view the message archiving rules for your SmarterMail installation, click the settings icon . Then expand the Routing folder and click Message Archiving in the navigation pane. A list of archiving rules will load in the content pane.

To create a new archiving rule, click New in the content pane toolbar. To edit an existing rule, select the appropriate rule and click Edit in the content pane toolbar. The following options will be available:

- Domain - The domain on the SmarterMail server to be archived.
- Archive Path - The directory on the hard drive in which archived messages are saved.
- Rule - Choose to save none of your messages, all messages, incoming messages, or outgoing messages.

Note: Archives are not deleted by SmarterMail and as a result they can get very large. Be sure to check your archive folders regularly to see if they should be backed up and removed from the hard drive.

Outgoing Gateway

Gateway servers allow you to reduce the load on your primary server by using a secondary server to process outgoing mail. Gateway servers can also be used to combat blacklisting. If the server gets blacklisted, simply rotate the primary IP on the network card to a different one to send out on the new IP.

To access the outgoing gateway settings, click the settings icon . Then expand the Routing folder and click Outgoing Gateways in the navigation pane. A list of incoming gateways will load in the content pane.

To add a new outgoing gateway, click New in the content pane toolbar. To edit an existing gateway, select the desired gateway and click Edit . The outgoing gateway settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Server Address - The IP address of the gateway server.
- Auth Username - The username of the gateway server given to you by your ISP.
- Auth Password - The password for your gateway server.
- Encryption - Select the type of encryption from the list.
- Priority Range - The priority range for this server.

- Enable SmarterMail gateway mode - Select this option to indicate that the outgoing gateway server is another SmarterMail server.

SmarterMail Gateway

Use this tab to specify the following settings:

- SmarterMail URL - The Webmail URL for the SmarterMail server being used as an incoming gateway. This will allow the use of Web services to verify the users and domains.
- SmarterMail Username - The identifier used to login to the primary mail server.
- SmarterMail Password - The corresponding password used to login to the primary mail server.

Incoming Gateways

purpose is to reduce server load. Generally, spam checks and antivirus scans should be performed on the incoming gateways.

To access the incoming gateway settings, click the settings icon . Then expand the Routing folder and click Incoming Gateways in the navigation pane. A list of incoming gateways will load in the content pane.

To add a new incoming gateway, click New in the content pane toolbar. To edit an existing gateway, select the desired gateway and click Edit . The incoming gateway settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Gateway Mode - The function that the incoming gateway will perform. If the incoming gateway is set to backup MX, it will only receive messages when your primary server is down. If the incoming gateway server is set to domain forwarding, it will receive all messages and forward them to your primary server.
- IP Address - The IP address of the primary mail server.
- User Verification - The method used by the incoming gateway to determine if a user is valid or not. Note: If none is selected, the incoming gateway server will accept all email addresses for the domain. If Web service is selected, the incoming gateway will check with the primary mail server for a list of valid email addresses.
- Enable SmarterMail Gateway Mode - Select this option to indicate that the incoming gateway server is another SmarterMail server.
- Disable Greylisting - Select this option to disable greylisting for the domain.

Domains

This tab is only available if the gateway mode is set to domain forwarding. Domain forwarding allows you to easily send mail through one server to another. This will allow your server to act as an incoming gateway to your network, and permit you to have a single point of entry for incoming SMTP traffic.

When messages come in to a forwarded domain, they are run through the command-line exe referenced in Protocol Settings. If a delivery delay has been established for the server, messages are also delayed accordingly. This allows you to establish an incoming server that can run external virus or spam scanners, which can reduce the load on your existing network servers.

Use this tab to specify for which domains the incoming gateway will accept mail:

- Domain Verification - The method used by the incoming gateway to determine if a domain is valid or not.
- Specified Domains - The specific domains for which the gateway will accept mail.

Spam

Use this tab to specify the following spam checks:

- Spam Low Action - The action the incoming gateway will perform on messages with a low probability of being spam.
- Spam Medium Action - The action the incoming gateway will perform on messages with a medium probability of being spam.
- Spam High Action - The action the incoming gateway will perform on messages with a high probability of being spam.

SmarterMail Gateway

This tab is only available if the SmarterMail gateway mode is enabled in the Options tab. Use this tab to specify the following settings:

- SmarterMail URL - The Webmail URL for the SmarterMail server being used as an incoming gateway. This will allow the use of Web services to verify the users and domains.
- SmarterMail Username - The identifier used to login to the primary mail server.
- SmarterMail Password - The corresponding password used to login to the primary mail server.

Sender Priority Overrides

Sender priority overrides allows the system administrator to assign priority levels to specific email

addresses. For example, a company may want the mail server to send emails from its support team (support@example.com) before sending emails to mailing lists.

To view the sender priority overrides, click the settings icon . Then expand the Routing folder and click Sender Priority Overrides in the navigation pane.

To create a new sender priority override, click New in the content pane toolbar. The following options will be available:

- Email Address - The email address of the user.
- Message Delivery Priority - The priority level assigned to this user's messages.
- Description - A brief summary why the sender priority override was created.

Activation

Licensing

To access view licensing information for SmarterMail or any add-ons, click the settings icon . Then expand the Activation folder and click Licensing in the navigation pane. The edition, version, and license level information for the version of SmarterMail currently being used will load in the content pane. The licensing information for any add-ons will also display in the content pane.

The following options are available from the actions toolbar:

- Activate - Activates a new SmarterMail license key.
- Reactivate - Reactivates a SmarterMail license key.
- Details - Displays details about the license, including feature, status, expiration, limits and available trials.
- Buy Now - Allows the system administrator to purchase a new license key or add-on.
- Start Trial - Allows the system administrator to begin an available trial.

SmarterMail Self Diagnostic

Use the SmarterMail Self Diagnostic to test your SmarterMail server for errors. To access this feature, click the settings icon . Then expand the Activation folder and click SmarterMail Self Diagnostic in the navigation pane. SmarterMail will perform a test and display the results in a popup window.

Security

Antivirus Administration

SmarterMail is equipped with effective and self-updating ClamAV antivirus protection out-of-the-box. In addition, SmarterMail can support additional third-party solutions that include a quarantine directory. SmarterMail has the ability to check the quarantine directory and respond to users that attempted to send an email containing a virus.

To view the antivirus settings for your server, click the security icon and then click Antivirus Administration in the navigation pane. The antivirus settings will load in the content pane and the following tabs will be available:

Options

- Enable ClamAV - Select this checkbox to enable ClamAV.
- Enable Real-Time AV - Select this checkbox to enable Real-Time AV.
- Enable Command-Line AV - Select this checkbox to enable a command-line virus scanner.

ClamAV

Clam AntiVirus is a third-party open source antivirus toolkit, designed especially for scanning email on mail gateways. For more information on ClamAV, visit: www.clamav.com

- IP Address - The IP address of the ClamAV server to use.
- Port - The port that the ClamAV server is listening on.
- Remote Server - Select this checkbox if the server is a remote server.
- Timeout - The maximum number of seconds to wait before moving on. By default, the timeout is 10 seconds.
- Failures Before Disable - The maximum number of timeouts allowed before ClamAV is disabled. By default, ClamAv is limited to 5 failures.
- Virus Definitions - The date and time the virus definitions were last updated. The definitions are updated whenever the service starts and every 6 hours thereafter. To manually update virus definitions, click Update ClamAV in the actions toolbar.

Real-Time AV

- Quarantine Directory - The full path to the quarantine directory for the server.
- Virus Action - The action taken when an email contains a virus. The available actions are:

- Delete - Deletes any files attached to the message from the spool directory. This does not take any action on the quarantine directory.
- Inform Sender - Informs the "From" address that a message was received by the server, and because a virus was found in the message, it did not reach the intended recipient. Note: With some of the more recent viruses, this action becomes less useful, as many viruses now spoof the "From" email address.

Command-line AV

- Command Line - The command that you want to execute. %FILEPATH will be replaced with the path to the file to be scanned.

Commtouch Zero-hour Antivirus

The Commtouch Zero-hour Antivirus add-on uses Recurrent Pattern Detection technology to identify identifies viruses based on their unique distribution patterns and provides a complementary shield to conventional AV technology, protecting in the earliest moments of malware outbreaks and continuing protection as each new variant emerges.

Commtouch evaluates each message and determines the probability that the message contains a virus. System administrators can choose the default action taken on a message when Commtouch determines the it has a medium, high, or definite probability of containing a virus. For more information, or to purchase this add-on, visit the SmarterTools website .

Antispam Administration

SmarterMail's antispam features allow you to be as aggressive as you want when combatting spam. Initial antispam settings were configured during installation, but these settings can be modified at any time.

Due to the flexible nature of SmarterMail's antispam setup, spam checks can influence the spam decision as much or little as you want. When spam protection runs on a particular email, all enabled spam checks are performed on the email. The total weight of all failed tests is what comprises the spam weight for the email. A spam probability level is then assigned to the email using the settings in the Filtering tab.

In short, when an email comes in, spam checks are run on it. The checks that fail add points to the email, which then put the email into a category of spam probability.

To view the antispam settings for your server, click the security icon and then click Antispam Administration in the navigation pane. The antispam settings will load in the content pane and the following tabs will be available:

Spam Checks

Use this tab to select the spam options that you want to enable for filtering (a point-based weighting system for filtering spam) and for blocking at the SMTP level. Weights can also be edited for the various checks from this tab. Note: Only enabled spam checks are used when calculating spam weight. To enable or disable a check, select the appropriate checkbox and click Save .

The following types of spam checks are available. In most cases, selecting the desired spam check and clicking Edit will allow you to set various properties.

Declude

Declude integration allows you to use Declude products in conjunction with the SmarterMail weighting system. Declude addresses the major threats facing networks, and are handled by a multi-layered defense. Configuration of Declude is done through the Declude product, and all you need to do in SmarterMail is enable the spam check. Declude score will be included on spam line. For more information, visit www.decluce.com .

SpamAssassin-based Pattern Matching

SmarterMail includes a proprietary pattern matching engine built upon the SpamAssassin technology.

- Low Spam Weight - The weight that will be assigned if the pattern matching engine determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if the pattern matching engine determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if the pattern matching engine determines a high probability of spam.
- Header Log Level - The amount of information the pattern matching engine inserts into the header of the message.

Remote SpamAssassin

SpamAssassin is a powerful, third party open source mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. By default, SpamAssassin will run on 127.0.0.1:783. For more information, or to download SpamAssassin, visit spamassassin.apache.org .

SmarterMail can use SpamAssassin with its weighting system:

- Low Spam Weight - The weight that will be assigned if SpamAssassin determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if SpamAssassin determines a medium probability of spam.

- High Spam Weight - The weight that will be assigned if SpamAssassin determines a high probability of spam.
- Client Timeout - The timeout that SmarterMail will impose on a server if it cannot connect.
- Max Attempts per Message - The number of times SmarterMail will attempt to acquire a SpamAssassin score for an email.
- Failures Before Disable - The number of times a remote SpamAssassin server can fail before it is disabled.
- Disable Time - The length of time before the SpamAssassin server is re-enabled.
- Header Log Level - The amount of information SpamAssassin inserts into the header of the message

Commtouch Premium Antispam

The Commtouch Premium Antispam add-on uses Recurrent Pattern Detection technology to protect against spam outbreaks in real time as messages are mass-distributed over the Internet. Rather than evaluating the content of messages, the Commtouch Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge. For more information, or to purchase this add-on, visit the SmarterTools website .

Custom Headers

Email can be assigned spam weights based on headers in the message. To configure weights for custom headers, complete the following fields:

- Header - The custom header to search for in the email message.
- Value - The value of the custom header.
- Weight - The amount to add to the email message's spam weight.

Custom Body Rules

Email can be assigned spam weights based on the body text of a message. For example, the system administrator can create a rule that assigns a specific spam weight to all messages containing the word "viagra" in the body text. To configure weights for custom body rules, complete the following fields:

- Rule Name - The name of the rule.
- Rule Type - The type of rule you use to evaluate the text for a match. Rule types are contains, wildcard or regular expression.
- Weight - The amount to add to the email message's spam weight.
- Rule Text - The text that triggers the custom body rule.

Bayesian Filtering

Bayesian filtering uses statistical analysis to identify whether or not an email appears to be spam. Bayesian filtering "learns" from previous spam-marked messages to progressively improve performance. Tying it together with blacklists and SPF allows you to be quite sure that email is or is not spam.

- **Weight** - The default weight for this spam check. If an email has a high probability of being spam based on its content, this is the value that will be added to the message's total spam weight.
- **Max memory to allocate for filtering** - Bayesian filtering can be memory intensive. As a result, SmarterMail allows you to configure the maximum resources that will be dedicated to Bayesian filtering. In general, the more memory you reserve for Bayesian filtering, the more accurate the results will be.
- **Messages required for filter update** - Once this number of messages have been processed as known-good or known-spam email, SmarterMail will reanalyze the filters to help your system protect against new spam threats. In this way, Bayesian filtering can become more tailored to handle the mail of the domains on the server.

DomainKeys

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

SPF (Sender Policy Framework)

SPF is a method of verifying that the sender of an email message went through the appropriate email server when sending. As more and more companies add SPF information to their domain DNS records, this check will prevent spoofing at an increasing rate.

- **Pass Weight** - Indicates that the email was sent from the server specified by the SPF record (more likely good mail). The weight you set may be 0 (for no effect) or a negative number, thereby reducing the spam rating.
- **Fail Weight** - Indicates that the email was sent from a server prohibited by the SPF record (highly likely spam). Set this to a relatively high weight, as the probability that the email was spoofed is very high.
- **SoftFail Weight** - Indicates that the email was sent by a server that is questionable in the SPF record. This should either be set to 0 or a low spam weight.
- **Neutral Weight** - Indicates that the SPF record makes no statement for or against the server that sent the email. Except in very special circumstances, leave this set to 0.

- PermError Weight - Indicates that there is a syntax error in the SPF record. Since SPF is relatively new, some domains have published improperly formatted SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.
- None Weight - Indicates that the domain has no published SPF record. Since SPF is relatively new, many legitimate domains do not have SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.

Reverse DNS (Domain Name Server)

Reverse DNS checks to make sure that the IP address used to send the email has a friendly name associated with it.

- Weight - The default weight for this spam check. If an email sender does not have a reverse DNS entry, this is the value that will be added to the message's total spam weight.

RBL Lists (Real-Time Blacklists)

RBL lists (also known as IP4R Lists) are publicly accessible lists of known spammer IP addresses. These lists can be a very important part of spam protection. To attach to a list, click Add List in the actions toolbar.

- Name - A friendly name for the list that will help you and your customers identify it.
- Description - This field allows you to store additional information about the list.
- Weight - The default weight for this spam check. If an email sender is listed with the spam list, this is the value that will be added to the message's total spam weight.
- Hostname - The hostname of the RBL.
- Required Lookup Value - The expected value returned from an RBL if the sender's IP is listed with the RBL provider.
- Enable bitmap checking - Select this checkbox if the RBL supports bitmapping. DNS Server - Spam lists operate through DNS. As a result, each list provider gives out a DNS server that contains the blacklist. Enter it in this box. --%>

Filtering

Emails are filtered into one of four categories based on their total weight. If a weight is equal to or higher than a certain category, then it is assigned that probability of being spam. Use the Actions tab to define the weight thresholds and the default actions at each level. Note: Users can override these settings if you permit them to.

- Weight Threshold - The email is sorted into probability levels based on the weight threshold values.
- Default Action - The action to take when a message ends up with this probability.

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

SMTP Blocking

This tab allows you to set up extra spam checks that block emails at delivery if a certain amount of spam checks fail.

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

Options

This tab contains options relating to the processing of spam and overridability.

- Auto Responders - Allows you to restrict what types of auto-responses are permitted for the system. Certain anti-spam organizations are starting to block those servers that auto-respond to spam traps. To reduce the possibility of this occurring, set the auto-respond option to be as restrictive as your clients will permit.
- Content Filter Bouncing - As with auto-responses, certain anti-spam organizations also blacklist those servers that send bounce messages back to spam trap accounts. SmarterTools recommends setting this option to be as restrictive as your clients will allow.
- Enable domains to override filter weights and actions - Many domain administrators have their own opinions on what spam checks work best for their domain. Enable this to allow them to override the spam options if they wish.
- Enable bounces for Outgoing SMTP Blocking - Enable this to give a user a notification when a mail message has not been sent due to spam.
- Enable Spool Proc Folder - Enable this to have SmarterMail place messages into this folder to be analyzed in the background. While the messages are in the Spool Proc folder, .hdr can manipulate elements of the message, such as edit, write, and add headers. Once the scan has been completed, the message will be placed back into the spool and handled by SmarterMail from that point on.
- Disable spam filtering on intra-domain email - Check this to disable spam filtering when messages are sent from from within the same domain (e.g. user1@example.com to

user2@example.com).

- Disable spam filtering on SMTP whitelisted IP Addresses - Check this to disable spam filtering on IP Addresses which have been added to a whitelist.
- Enable Catch-All accounts to send auto-responders and bounce messages - Enable this if you rely on auto-responders being sent when a message comes in through a catch-all. In general, this is a bad idea, so it should be left unchecked unless your situation specifically requires it.

Bypass Gateways

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

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

Greylisting

What is Greylisting and how does it work?

Greylisting is a new tool in the fight against spam. It will temporarily block incoming mail from a sender and then returns the mail to the sender's mail server with a message saying effectively, "try again later." The sending server must then retry sending the mail after the Block Period but before the Pass Period (see below for definitions of these values).

Greylisting is effective because spammers will not usually bother to attempt a second delivery, but legitimate e-mail servers will.

Why use Greylisting?

Greylisting is a very effective method of spam blocking that comes at a minimal price in terms of performance. Most of the actual processing that needs to be done for Greylisting takes place on the sender's server. It has been shown to block upwards of 95% of incoming spam simply because so many spammers don't use a standard mail server which would do automatic retries.

How do I set up Greylisting?

Note: You must be a system administrator to change greylisting settings.

In order to set up Greylisting, click the security icon and click Greylisting in the navigation pane. The greylisting settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following settings:

- Block Period - The period of time (in minutes) that mail will not be accepted (default 15 minutes).
 - Pass Period - The period of time (in minutes) in which the sender's mail server has to retry sending the message (default 360 minutes).
 - Record Expiration - The period of time(in days) that the sender will remain immune from greylisting once it has passed (default 36 days).
 - Apply To - Select who greylisting applies to.
 - Enable Greylisting - Select this option to enable greylisting.
 - Enable users to override greylisting - Select this option to allow users to selectively turn off greylisting (useful if you have an account that receives time sensitive mail).
 - Greylist if the country for the IP address is unknown - Select this option to greylist messages when the country cannot be identified for the IP address. Enable Greylisting to SmartHosts - If this feature is enabled, it will determine whether or not SmartHosts are governed by Greylisting. This is determined by evaluating the MX record of the recipient's address and matching it against the IP address of any target server IP address configured in the SmartHost settings area. For more information, see the SmarterHosts section of the online help. --%> System administrators should note that the following cases are exempt from greylisting:
- Whitelisted IPs for SMTP or Greylisting
 - Anyone who authenticates (includes SMTP Auth Bypass list)
 - Trusted senders
 - Anyone who has already sent you an email
 - Any IP in the greylistBypass.xml file

Disadvantages of Greylisting

The biggest disadvantage of Greylisting is the delay of legitimate e-mail from servers not yet verified. This is especially apparent when a server attempts verify a new user's identity by sending them a confirmation email.

Some e-mail servers will not attempt to re-deliver email or the re-delivery window is too short. Whitelisting can help resolve this.

Blacklist / Whitelist

System administrators can control which IP addresses are blacklisted (not allowed) from mail services on this machine, or whitelisted (trusted) to access the mail services on this machine.

To manage the blacklist, click the security icon and click Blacklist in the navigation pane.

To manage the whitelist, click the security icon and click Whitelist in the navigation pane

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

Adding/Editing an Entry

To edit a blacklist or whitelist, click Edit in the content pane toolbar. To create a new entry in the blacklist or whitelist, click New in the content pane toolbar. The blacklist or whitelist settings will load in a popup window and the following options will be available:

- IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to add only a single IP (ex: 192.168.1.26).
- IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be added (ex: 192.168.1.1 - 192.168.1.255).
- Blacklist or Whitelist SMTP / POP / IMAP / Greylisting - Check the boxes for the protocols you wish to include in the blacklist or whitelist entry. The Greylisting checkbox is only available for whitelisted IPs, and if checked, the whitelisted IP will not be greylisted.

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To edit a blacklist or whitelist, click Edit in the content pane toolbar. To create a new entry in the blacklist or whitelist, click New in the content pane toolbar. The blacklist or whitelist settings will load in a popup window and the following options will be available:

- IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to add only a single IP (ex: 192.168.1.26).
- IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be added (ex: 192.168.1.1 - 192.168.1.255).
- Blacklist or Whitelist SMTP / POP / IMAP / Greylisting - Check the boxes for the protocols you wish to include in the blacklist or whitelist entry. The Greylisting checkbox is only available for whitelisted IPs, and if checked, the whitelisted IP will not be greylisted.

SMTP Authentication Bypass

SMTP Authentication is a security measure that can be very beneficial in the fight against spam and unauthorized email. Unfortunately, some applications do not have support for SMTP authentication when sending mail. Most often, these are web sites that have automated mail sending mechanisms.

The solution is to add the IP addresses of the servers/sites to SmarterMail's SMTP Authentication Bypass. Any IP address entered into this page will not be asked to provide an SMTP Authentication login. In this list you can see all IP addresses that are bypassing SMTP Authentication.

To get started, click the security icon and click SMTP Authentication Bypass in the navigation pane. A list of bypasses IP addresses will load in the content pane and the following options will be available in the content pane toolbar:

- New - Adds new IP addresses to bypass.
- Edit - Edits the selected IP address.
- Delete - Permanently removes the IP address from the SMTP authentication bypass list.

Advanced Settings

Abuse Detection

SmarterMail has several methods of preventing abuse and denial of service (DoS) attacks. The ones that can be configured are explained below. Any number of detection methods can be added.

To view the configurable abuse detection settings, click the security icon . Then expand the Advanced

Settings folder and click Abuse Detection in the navigation pane. A list of abuse detection rules will load in the content pane and the following options will be available in the content pane toolbar:

- New - Creates a new abuse detection rule.
- Edit - Edits the selected abuse detection rule.
- Delete - Permanently deletes the selected abuse detection rule(s).

To create a new abuse detection rule, click New in the content pane toolbar. The abuse detection settings will load in the content pane and the following options will be available:

Denial of Service (DoS) Prevention - Too many connections from a single IP address can indicate a Denial of Service (DoS) attack. Enable this option to block IPs that are connecting too often to the server. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists or make many connections if you enable this option.

- Service Type - Select the service that will be monitored for this type of attack (POP/SMTP/IMAP/LDAP).
- Time Frame - The period of time in the past that is examined to determine if an IP address should be blocked. Too many connections in this period of time, and a block will be initiated.
- Connections Before Block - The number of connections before a block is placed. It is common for several connections to be open at once from an IP address. Set this to a relatively high value so that you can catch DoS attacks while not impacting legitimate customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

Bad SMTP Sessions (Email Harvesting) - A bad session is any connection that ends without successfully sending a message. Many bad sessions usually indicate spamming or email harvesting. Leaving all of these options set to 0 (zero) will disable this type of abuse detection. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists if you enable this option.

- Time Frame - The period of time in the past that is examined to determine if an IP address should be blocked. Too many bad sessions in this period of time, and a block will be initiated.
- Bad Sessions Before Block - The number of bad sessions before a block is placed. A few bad sessions happen once in a while, for instance when a person sends an email to an email account that does not exist. It is not these people that you are targetting, but rather those that are attempting to compromise or harass your customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

Internal Spammer Detection and Notification - Enabling this feature in SmarterMail will alert an administrator whenever a multiple emails are received on the server of the same size.

- Time Frame - The period of time in the past that is examined to determine if an alert should be sent. Too many duplicate emails in this period of time, and an alert will be sent.
- Messages Before Notify - After this many duplicate messages are received within the time period specified, the email notification is sent.
- Email to Notify - The administrator account to which the notification will be sent.

Password Requirements

To ensure the security of the mail server and its mailboxes, system administrators can specify minimum requirements for user passwords. To access the password requirements settings, click the security icon . Then expand the Advanced Settings folder and click Password Requirements in the navigation pane. The password requirement settings will load in the content pane and the following options will be available:

- Minimum Password Length - The minimum number of characters the password must have.
- Require a number in the password - Select this option to force users to include a number in the password.
- Require a capital in the password - Select this option to force users to include a capital letter in the password.
- Require a lowercase letter in the password - Select this option to force users to include a lowercase letter in the password.
- Require a symbol in the password - Select this option to force users to include a symbol in the password.
- Require password does not match username - Select this option to ensure that the username and password do not match.
- Disable password strength for existing passwords - Select this option to allow changes to the password requirements to only affect new users or new passwords.

SMTP Blocked Senders

The SMTP Blocked Sender list is an effective method for temporarily canceling a domain or individual user's ability to send email on the server. For example, if a particular account is sending an abnormal amount of email, you can add their address to Blocked Senders and they will be unable to send email until you remove them from the Blocked Senders list. Users and/or domains can be left on the list for whatever time you deem appropriate, and can be an effective stop-gap versus actually deleting the user and/or domain from the server.

To view blocked senders, click on the security icon . Then expand the Advanced Settings folder and click SMTP Blocked Senders in the navigation pane. A list of blocked senders will load in the content pane and the following options will be available from the content pane toolbar:

- New - Adds a new SMTP blocked sender.
- Edit - Edits the selected blocked sender.
- Delete - Permanently removes the email or domain from the blocked senders list.

SSL

This page is available in Enterprise Edition only

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

To view the SSL and TLS rules, click the security icon . Then expand the Advanced Settings folder and click SSL in the navigation pane. A list of SSL and TLS rules will load in the content pane and the following options will be available in the content pane toolbar:

- New - Adds a new SSL/TLS rule.
- Edit - Edits the selected SSL/TLS rule.
- Delete - Permanently deletes selected the SSL/TLS rule(s).

Creating New SSL/TLS Rules

When adding a new rule there are several fields that need to be addressed. These fields are:

- IP Address - The IP address where SmarterMail will listen.
- SMTP, POP, IMAP - Determines on which port SmarterMail will listen for the respective protocol.
- Type - Sets the type of rule you would like to add, SSL or TLS. SSL always assumes the connection will be secure, and therefore, sends the encryption immediately. TSL connects normally, and then looks to see if the connection is secure before sending the encryption.
- Certificate Path - The path to the certificate file on the server. Typically, named a *.cer file.
Note: The certificate you are using must be added to the Certificates Microsoft Management Console within your Windows operating system. In addition, you must associate the Private Key with this same certificate.

SpamAssassin

SpamAssassin is a powerful, free mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. These include:

- Header and text analysis
- Bayesian filtering
- DNS blocklists
- Collaborative filtering databases

Adding a SpamAssassin Server

To add a SpamAssassin server go to the SpamAssassin page in the Security menu. Here you will be presented with a list of servers currently set up to run SpamAssassin checks. To edit one of these servers simply click on it in the list, see below for a complete list of options. To add a new server simply click the Add SpamAssassin Server button, see below for a complete list of options. When you are finished adding the server click on the save button to add it to the list. For more information on downloading and installing SpamAssassin on your server please check out their website .

Add SpamAssassin Server Form

- Name - The name you wish to call this server
- IP Address - The IP address of the server running SpamAssassin
- Port - The SpamAssassin port on the server running SpamAssassin (783 by default)
- Multithreaded - If the server you have installed SpamAssassin on is a Linux machine it is recommended that you check this. If it is running on a Windows machine you cannot have this selected.

Additional Help Topics

Automating Login to SmarterMail

The HTML code below demonstrates how you can make a text link (e.g. "Log into your mail") that automatically logs a user in to the SmarterMail application. By putting a hidden form on a simple web page, you can fill in the "Email Address", and "Password" information either via hard coding the data or through a scripting language like ASP, ASP.Net, or ColdFusion.

For the example code listed below, we have the form values set to generic text (e.g. "Actual_Email_Address_Here") to show where you would hard code values that are submitted to the login.aspx page. You could also dynamically generate these values using a scripting language like ASP or ColdFusion (a sample ASP script would substitute value="Actual_Email_Address_Here" with value=<% =email %>). The form action shown (<http://127.0.0.1:9998/smartermail/login.aspx>) uses the default location of the Smartermail Web Interface. If you have created a separate web site for Smartermail, or assign a different IP address for Smartermail within IIS, this action would have to be

altered to reflect this change. This example demonstrates how easy and powerful the Smartermail application is in allowing companies to automate entry into the mail application.

```
<html>
```

```
<head> <meta http-equiv= "Content-Language" content= "en-us" > <meta http-equiv= "Content-Type" content= "text/html; charset=windows-1252 "> <title>Smartermail Login</title> </head>
```

```
<SCRIPT LANGUAGE= "JavaScript" > function GoToMail() { document.mailform.submit(); } </SCRIPT>
```

```
<body>
```

```
<form name= "mailform" action= "http://127.0.0.1:9998/Login.aspx" method= "post" > <input type= "hidden" name= "shortcutLink" value= "autologin" id= "shortcutLink" > <input type= "hidden" name= "email" id= "email" value= "Actual_Email_Address_Here" > <input type= "hidden" name= "password" id= "password" value= "Actual_Password_Here" > </form>
```

```
<p><a href= "JavaScript:GoToMail()" > Log into your mail </a></p>
```

```
</body>
```

```
</html>
```

Gateways and Other Server Roles

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

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

Primary mail server

- Use for storing email for defined users.
- Accessible through POP, SMTP, IMAP, and over the web.
- To configure:
- Follow instructions in online help

Backup MX Server

- Use as a backup for mail delivery in case of short amounts of downtime or delivery problems on your primary mail server.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

Incoming Gateway server

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

- Use to host third party anti-virus and/or anti-spam software products in order to reduce load on primary server.
- Reduces load on primary server by managing all incoming sessions and performing abuse/intrusion detection.
- To configure:
- Enable domain forwarding and add all destination IPs and domain names that will be forwarded.
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- In DNS, change the MX records of your domains to reference the new gateway server.
- Install and configure any third-party anti-virus or anti-spam products, such as Declude JunkMail or Declude Virus.

Outgoing Gateway server

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

- Use as a delivery mechanism to reduce load on your primary servers.
- Also use as a method to combat blacklisting. If the server gets blacklisted, rotate the primary

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

- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

SmartGateway server

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

- Use as a delivery mechanism to balance the load on your gateway servers.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

Backup MX Servers

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

- Hardware or software failure
- Very busy and unable to receive new incoming connections, or emails
- Network connection is down or saturated
- Network routing issues can also cause your mail server to become unavailable

Case 1 - No Backup MX

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

- Email will be bounced (Returned to Sender).
- Your (inbound) email will cause a backup in the originating mail server's spool.
- Service Timeout. Depending on the Retry attempts by the originating mail server, your mailboxes may never receive their incoming email.
- Users do not understand bounce messages. To most users, bounce messages are unreadable, so when they can't send an email, they do not try to resend.

Case 2 - With a Backup MX

How Email works when a Backup MX Server is involved:

- User sends an email to 'user@example.com' (a mailbox hosted by your SmarterMail Server)
- Their mail server looks up the MX Records for 'example.com' and finds two:
 - IP: x.x.x.x Weight: 10
 - IP: y.y.y.y Weight: 20
- Their mail server first attempts to connect to: x.x.x.x
- Connection fails, which could be caused by any of the above conditions
- They try to connect to the secondary MX record: y.y.y.y
- They successfully connect to this server.
- Email transmission begins, and the Backup MX Server receives the email into its spool.
- Since there are no existing local domains on this server, SmarterMail stores this email in its spool.
- Based off of the Retry Attempts, SmarterMail will continue to try and make connections to your Primary Mail Server.
 - SmarterMail will only make 4 retry attempts. It is recommended that you set the last attempt to a longer timeframe, i.e., 24 hours (1440 minutes)
 - This way SmarterMail does not send a Bounce Message to the originator saying that it could not deliver the message, before your Primary Server is back online.
 - If your Primary Mail Server comes back online before the final Retry Attempt, you can reset the Retry Counts on all messages in the spool. This will force the Backup MX Server to try forwarding all existing mail in the spool back to your Primary Mail Server.

Configuring a Backup MX Server

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

Locking Down Your Server

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

What is Security for a Mail Server?

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

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

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

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

Update SmarterMail Regularly

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

To receive notifications of every update that SmarterTools releases for SmarterMail, go to the SmarterTools Customer Portal , login, select Account Management, then select Mailing Lists, and choose the "Updates.SmarterMail" subscription. Whenever a new update for SmarterMail is released, an email is sent to that mailing list. The list is not used for any other purpose.

Disable Catch-All Accounts

Catch-all accounts were popular in the past because of the flexibility they offer to a domain administrator. All an administrator had to do was add a catch-all account, and any mail that was mis-delivered would drop right into his mailbox. When catch-alls were most popular, spamming methods were not as sophisticated, and email harvesting attacks were not so prevalent.

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

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

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

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

Restrict Bounces and Auto-Responders

Email Bouncing occurs when delivery failures occur or a mailbox is full. A brief explanation of the error is sent back to the original sender of the message. Before spam became such a problem, this was usually not an issue. Today, however, spammers will sometimes spoof known spam trap accounts at places like SpamCop as the sender of the message. Thus, when your mail server bounces the message, the bounce ends up in the spam trap. Enough of these, and you'll be blacklisted.

The exact same is true for auto-responders that reply back to spoofed spam email.

SmarterMail allows you to restrict bounces and auto-responders to only those accounts that pass SPF checks, or to disable them entirely. SPF verifies that an email is not spoofed, and most of the serious spam trap accounts out there have SPF set up. To require SPF for bounces and auto-responders, do the following:

- Alert your users of the new policies being put into place.
- Go to the General Settings page under the Settings menu.
- Click on the Security tab.
- Change Auto-Responders to either Disabled or Require SPF.
- Change Bouncing to either Disabled or Require SPF.
- Click on Save icon.

Require SMTP Authentication

SMTP Authentication is an unspoken requirement of domains on modern mail servers. Any domain that does not have Authentication enabled is at a serious risk of being a relay for spam. Spammers will

try thousands of email accounts until they find one to send through, and if Authentication is not enabled, they will be able to use up your bandwidth and system resources to send mail.

Enabling SMTP Authentication ensures that users must supply credentials to send email from your server. This requires a change in their email clients so that the account information gets passed in SMTP, so there is often a bit of a learning curve. This process is necessary and important to protect your server, however, and without you are open for abuse.

To require SMTP Authentication for a domain, do the following:

- Alert your users of the change they will need to make to their email client. Due to the nature of this change, it is wise to give them a fair amount of warning.
- Go to Manage Domains.
- Click on the Actions menu next to the domain and choose Edit Domain.
- Go to the Technical tab.
- Check the Require SMTP Authentication box.
- Click on Save icon.

It is also recommended that you update this setting in Default Domain Settings so that all new domains will require SMTP Authentication.

To apply this setting to all domains on your server at once, use the Default Domain Settings Propagation page in the Settings menu.

Encourage the Adoption of SPF

SPF is an excellent method of preventing email spoofing, protecting your users from having their domain show up on spam throughout the world. SPF, however, is only as effective as you make it, as it requires changes to your DNS servers for each domain you host email for.

It is in the best interest of all email users everywhere that domain administrators add SPF records to their domain that indicate what servers are authorized to send email for their domain. Encouraging your domain administrators to adopt SPF protects them from being the victims of spoofing, and reduces the spam threat on not only your server, but others throughout the world as well.

More information can be found at: <http://www.openspf.org/>

Proper DNS Settings for Email

There are several major things to set up on your DNS server for each site you add to SmarterMail. How you set these up is dependent upon both who hosts your DNS and what DNS software is used. Check your DNS server documentation for instructions on how to set up the following records (replace example.com with the proper domain name).

Also, please bear in mind that your DNS may need to be set up differently. This is only a guideline that is recommended for most installations.

- WebMail URL - Add an A or CNAME record for mail.example.com that points to the IP address of the webmail interface. This will allow users of that domain to access the webmail by typing in <http://mail.example.com> or <http://mail.example.com:9998> in their web browser (depending on whether you use the included web server or IIS).
- Mail Pointer (MX) - Add an MX record for the domain that points to mail.example.com. This will allow other email servers to locate your mail server.
- Reverse DNS Record - Add a reverse DNS record for IP addresses assigned on the server to provide extra assurance to other mail servers. Also, it is recommended that the primary IP address of the server also have a reverse DNS record.
- Sender Policy Framework - Some large email providers like Hotmail and AOL are starting to require specially formatted TXT records to be added to your DNS. This special format is known as SPF (Sender Policy Framework). Information about how these records should be formatted can be found at <http://spf.pobox.com> . Please keep in mind that the owners of the domains may have significant input on what goes into these records.

Changing the System Administrator Login

By default, the login for the system administrator for SmarterMail is admin/admin . While this is easy to remember, it is also fairly easy to guess. When installing SmarterMail for the first time, you will be required to change this password during the setup wizard. Here are instructions in the manner you would want to change the system administrator password again.

Instructions

- Login as the administrator with the current login.
- Click the Settings icon.
- Choose General Settings in the left tree view.
- Click on the Administrator tab.
- Enter the current password for verification.
- Enter a new username and password (avoid using an email address for the username).
- Click on Save icon.

Resetting an Unknown Login

For instructions on how to reset an administrator login when the current login is unknown, please see the KB article [How To - Reset an Administrator Username and Password](#) .

Troubleshooting a Domain

There are times when you will need to access domain specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to login automatically as the domain administrator. This can be a useful method to examine domain settings or configure settings.

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

For instructions on troubleshooting specific user accounts on a domain, please see the topic [Troubleshooting an Email Account](#) .

Modifying Scoring for the SpamAssassin-based Pattern Matching Engine

System administrators can modify the scoring for the SpamAssassin-based pattern matching engine using the local.cf file. However, this feature is only recommended for experienced system administrators.

The local.cf file is placed in the service's SData folder. It is used to override existing tests or to create new tests supported by SmarterMail. Note: Any modifications to the local.cf file will not be overwritten when installing a new version.

Overriding an Existing Test's Score

The most common modification to the local.cf file will be to override an existing test's score. For example, if a system administrator notices a lot of spam messages getting into his users' mailboxes that are failing a particular test, he may want to override that test's score.

To do so, the server administrator would add something like:

```
score TEST_I_WANT_TO_OVERRIDE 1.3
```

Here score is the keyword used by the engine, TEST_I_WANT_TO_OVERRIDE corresponds to the existing test they want to override and 1.3 is the new score.

Creating a New Test

If a system administrator notices a new pattern appearing in spam messages that isn't covered by the default files, he may want to create a new test. This would look something like this:

```
body NEW_TEST /test/ #look for the word test in the body of the email score NEW_TEST 10.3
```

Here body is the keyword for determining the type of test, NEW_TEST is the name of the new test, /test/ is the perl style regular expression that will be used while scanning the email, and everything after the pound-sign is a comment.

The system administrator will also need to score the new rule so that it has some affect on the final weight.

Glossary

Below is an alphabetized list of the various terms and phrases used in the SmarterMail Product.

SMARTERTOOLS END USER LICENSE AGREEMENT

SmarterTools, Inc. Software License Terms

This End User License Agreement ("EULA") is between SmarterTools, Inc. ("SmarterTools") and the License holder ("You") of the software product this EULA accompanies ("Software"). It is important to read and understand all of the terms, limitations, and conditions contained in this EULA prior to installing and using the Software because they affect how You may use the Software and Your rights under this License. By explicitly accepting this EULA, or by installing, copying, downloading, accessing, or otherwise using the Software, You agree to be bound by the terms of this EULA. If, prior to using or installing the Software, You decide that You are unable or unwilling to agree to the terms of this EULA, promptly and completely uninstall and destroy any electronic copies of the Software and accompanying items in your possession.

This EULA shall apply to:

- * This Software
- * Future Versions of this Software
- * Updates, add-ons, and plug-ins to this Software, as may be made available by SmarterTools from time to time, including but not limited to language packs, dictionaries, and skins (collectively "Updates")
- * Features selection(s), including, but not limited to, "Professional," "Enterprise", and "Free" editions of the Software, and maximum allowed numbers of users, profiles, devices, email addresses domains, web sites, or agents ("level");
- * Services, support, advice, and recommendations related to this Software that may be made available by SmarterTools on the Internet, in the Software documentation, or by telephone
- * Any and all Technical Support Services offered in connection with the Software

DEFINITIONS

The following definitions shall apply for the purposes of this EULA:

- * "Dedicated Hosting" shall refer to an individual, group, or organization ("Dedicated Host") that maintains a physical server device that is wholly or, in the case of Virtual Private Servers ("VPS"), a dedicated portion of a physical server device that is sold, leased, or otherwise made available to a third party; whether or not a fee or other compensation is exchanged; and in which the third party has authorization and/or access to the activation areas of the software and/or to system administration functions.

* "Effective Date" shall be the date upon which this EULA was accepted by You.

* "Elastic Computing" shall refer to a user's ability to install software, create websites or instantiate a database on one or more Workers that can then be given incremental CPU cycles or percentages, memory (RAM) allocations, and/or physical disk space and bandwidth allocations that can all, then, be managed (increased or decreased) separately and on an as needed basis.

* "Failover" is the ability of a system to automatically switch to a second, standby system should the primary system fail or is temporarily shut down.

* "License" shall refer to the revocable, non-exclusive, non-transferable license to use the Software ("License") in accordance with the terms and conditions of this EULA. The term License applies to purchased and non-purchased Licenses, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable and/or activate the software or certain Features Selection(s) in the Software (collectively, "License Keys").

* "License Key" shall apply to the alphanumeric combination entered/applied upon installation and used to access Feature Selections. License Keys are delivered to the owners of purchased (paid for) Licenses and to those who may receive authorized promotional or trial Licenses, if applicable (pursuant to this EULA). SmarterTools may create and provide certain Levels, Editions, and/or Versions of the Software that do not require entry or use of a License Key for promotional or other purposes. This EULA remains in full force and effect whether or not a License Key is required or provided by SmarterTools.

* "Load Balancing" is a networking methodology whereby processing and workload is distributed evenly among a group of independent machines (e.g., servers) so that no single device is overwhelmed and so that there is no single point of failure.

"Multi-tenancy" and "Multi-tenant license(s)" shall refer to the ability of any single license to support multiple separate and unique client organizations, particularly when offering a single license in a Software as a Service (SaaS) capacity. For the purposes of this EULA, only SmarterStats and SmarterMail are multi-tenant licenses.

* "Periodic License" shall be a License with a defined temporal component (start and end date) whether or not such License is subject to renewal, automatically renews, effectively terminates, or is extended (e.g., Monthly/Lease Licenses, Trial Licenses, Development Licenses). Periodic Licenses may be governed by additional terms and conditions in a separate written agreement.

* "Third Party Providers" shall be any other software, application, plug-in, add-on, utility, tool, device, or methodology by any individual, group, organization, affiliation, company, or other entity that connects, modifies, links, and/or integrates to/with the Software for any purpose whatsoever.

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* "Worker(s)" shall be the location where software, websites or databases are installed in an Elastic Computing environment. A Worker can then have CPU cycles, disk space and RAM allocations and bandwidth modified (i.e., increased or decreased) on an as needed basis to accommodate shifts in traffic and usage. Also known as a worker process.

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The Software is designed to integrate and/or to be used in conjunction with Third Party Providers through Web services. SmarterTools assumes no liability and makes no warranty or guarantee regarding the applicability of effectiveness of this Software when used in conjunction with these products or whether or not such integration or use might interfere with the operation therein. You agree to hold SmarterTools harmless in all matters resulting from the integration or use with Third Party Providers.

D. Limitation of Liability

Your sole remedy under this Agreement shall be limited to replacement of the Software.

4. Technical Support

Currently, SmarterTools provides technical support for the Software via SmarterTools personnel, documentation, and Internet resources. Depending on Your Features Selection, including but not limited to pricing, volume, Software version, and the number of licenses You purchased, a certain amount of technical support may be included at no additional charge. Otherwise, technical support may be available for an additional charge on a per incident, per call, or per time-frame basis or in other support packages. The amount of these charges may vary from time to time. Technical support is provided AS-IS, and the provisions of section 3.A., 3.B., and 3.C. apply to technical support.

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You shall defend, indemnify, and hold harmless SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns (hereafter "SmarterTools Indemnified Parties") from any claims, damages, losses, or expenses (including without limitation attorney fees and costs) incurred in connection with any and all damages, losses, claims, suits, judgments, or causes of action asserted against SmarterTools Indemnified Parties by third parties or Your Customers related to:

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7. Jurisdiction.

This Agreement shall be governed in all respects by the laws of the United States and the State of Arizona, except for conflict of law's provisions. The parties agree that for any dispute, controversy, or claim arising out of or in connection with this Agreement, venue and personal jurisdiction shall be in the federal, state, or local court with competent jurisdiction located in Maricopa County, Arizona. The prevailing party will be entitled to an award of reasonable attorney's fees.

In the case that You are an agency or entity of the United States Government, the following additional terms apply:

* The Software qualifies as Restricted Computer Software, as defined in the Rights in Data-General clause at Federal Acquisition Regulations 52.227-14.

* Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013.

8. Payments.

You shall pay the total fee(s) for the Software imposed by SmarterTools at the time of purchase. You shall pay all invoices rendered by SmarterTools within thirty (30) calendar days after the invoice date, or within another time frame set forth by SmarterTools in writing in a separate agreement. All payments shall be made in United States Dollars (\$). If You fail to pay any amount due within the above timeframe, SmarterTools may impose late charges equal to the lesser of 1.5% per month or the highest interest rate allowable by applicable law, together with all related expenses and collection costs, including reasonable attorneys' fees, incurred by SmarterTools collecting any amounts owed under this EULA. Further, You shall reimburse SmarterTools for any out-of-pocket expenses incurred in connection with duties performed by SmarterTools hereunder. Upon request by You, SmarterTools

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At purchase of the Software and at other times during the term of this EULA You will be required to supply certain information including, but not limited to, email address(es), password(s), personal and/or company information, payment information (e.g. credit card information), and/or other personally identifiable and potentially valuable information. Acceptance of this Agreement indicates Your willingness to provide this information and have it transmitted to SmarterTools via internet, phone, facsimile, verbally, or otherwise and Your assumption of the incumbent risks associated with such transfers. SmarterTools takes the privacy and security of data very seriously and will make efforts to protect data in accordance with our privacy policy. A copy of the SmarterTools privacy policy is available by request. In any event, SmarterTools and its suppliers, licensors, successors, affiliates, agents, employees, executives, and assigns shall not be liable for any stolen, misdirected, or otherwise mishandled information pursuant to this EULA.

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12. Severability.

The provisions of this Agreement will be deemed severable and the invalidity or unenforceability of any provision(s) will not affect the validity or enforceability of any other provision(s) herein.

13. Entire Agreement.

This EULA constitutes and expresses the entire agreement and understanding between the parties hereto with respect to the subject matter, all revisions discussions, promises, representation, and understanding relative thereto, if any, being herein merged. This Agreement replaces and supersedes any prior agreement entered into between the parties hereto with respect to the subject matter herein.

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