Help for Users & Domain Administrators

Help Documentation

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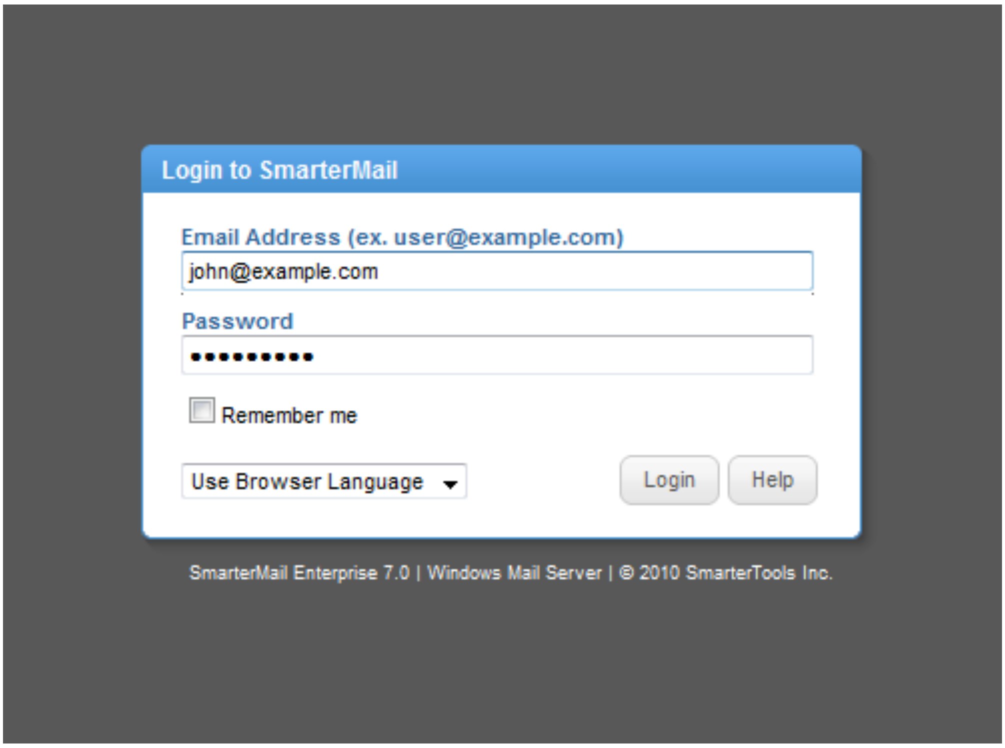
Logging in to SmarterMail

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 a 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, simple 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 do 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, simple 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 do 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 by 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 by synced using each method.
- Desktop - Lists desktop devices and applications that can by 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 by 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 wesites 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.

News and Finance • 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 Entertainment • Tapestry Comics [feed-list] • NY Times: Opinion • Dictionary word of the day Finance • Kiplinger Personal Finance • SmartMoney	Technology • PC Magazine: New Product Reviews • Slashdot News • TheWHIR Web Host News • Wired News • AnandTech's DailyTech News Sports • ESPN News • Fox Sports • CBS SportsLine [feed-list] • NY Times: Sports

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 occured 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 occured 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 occured 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 occured 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 will 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 occured 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 occured 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 occured 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 occured for incoming mail.

SpamAssassin Servers

This reporst 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 follow 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 will 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 will 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

Tis 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 cotent 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 wil 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 appropiate 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 includion 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 adminstrator 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 acount 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 acces 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 aways 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 antispam measures that will help keep your inbox free of unwanted mail. Your domain administrator has probably already set up some basic spam filtering options.

To view your spam filtering settings, click the settings 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 exapnd the My Settings and Advanced Settings Folder and click Caledar 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 filed 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 a 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 cotent 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 - Selec 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 appropiate 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 includion 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 aaccess - 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 Aaccess - 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.

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 aways 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

SmaterMail'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 passowrd 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 approrpriate 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 approrpriate 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 semd 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 approrpriate 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 approrpriate 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 buttion 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 progagation, click the settings icon . Then expand the Domain Settings and Advanced Settings folders and click user Propagation in the navigation pane. The defaul 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 the 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.

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.