



# Email

Help Documentation

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## Email Overview

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

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

## Navigating Your Inbox

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

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

- **Checkbox** - Use these boxes to select multiple messages. Messages must be selected before choosing an action from the actions toolbar.
- **Status Indicator** - The five status icons inform the user of what actions have been taken for each message in their inbox. The icons are as follows: the yellow envelope indicates an unread message; the open envelope means the message has been read; the envelope with a blue arrow indicates a reply; the envelope with a red arrow indicates a forward; and the calendar indicates a new appointment invite or appointment invite response.
- **From** - The sender of the email message.
- **Subject** - The subject of the email message.
- **Date** - The date and/or time the mail system received the email.
- **Size** - The size of the email in kilobytes.
- **Attachment Icon** - If the message has an attachment(s), a paperclip icon will display next to the message size.
- **Follow-up Flag** - If the message is marked for follow-up, the flag icon next to the message size will be red. If the message is not marked for follow-up, the flag icon will have a gray outline.

## Performing Email Actions

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

- **New** - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.

- Actions - Click this button and select the appropriate option to create a new folder, rename a folder, or delete a selected folder.

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

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

Deleted Items folder. This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not. This option is most useful in folders like Junk E-Mail or Deleted Items.

- Refresh - Manually refreshes the list of messages in the content pane.

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

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

## Disk Space Indicator

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

## Reading Email Messages

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

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

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

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

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

- Forward -- Sends the message to someone else.
- Delete -- Moves the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Add -- Creates a new task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- Print -- Prints the message.

## Downloading Email Attachments

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

## Changing the Message View

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

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

- HTML -- Displays the message in HTML format, which allows for colors, fonts, graphics, and other formatting.
- Text -- Displays the message in plain text, which only allows text content with no special formatting or graphics.
- Header -- Displays the header of the message, which indicates the path the email took to get to your email account, along with several other pieces of information.
- Raw Content -- Displays the content of the email exactly as the server received it. This is helpful if you cannot view the message in any other display mode.

## Composing Email Messages

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

### Creating a New Message

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

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

- **To** - Type the email addresses to which the message will be sent or click **To** to select email addresses from your address book. SmarterMail Enterprise users can change the list source to select email addresses from the Global Address List. Note: When entering addresses into the **To**, **Cc**, and **Bcc** fields, SmarterMail will auto-complete addresses by referencing your contacts list or the Global Address List.
- **Cc** - Type the email addresses of recipients that should receive a carbon copy of the message or click **Cc** to select email addresses from your address book.
- **Bcc** - Type the email addresses of recipients that should receive a blind carbon copy of the message or click **Bcc** to select email addresses from your address book. Note: Emails listed in this field will be concealed from the complete list of recipients. For this reason, it is common practice to use the **Bcc** field when addressing a very long list of recipients or a list of recipients that should not (necessarily) know each other.
- **Subject** - Type the subject of the email.

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

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

## Replying to Email Messages

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

- Reply - Addresses a response to the sender only.
- Reply All - Addresses a response to the sender and everyone else who received the message.

This includes all email addresses listed in the To and Cc fields, except your own email address.

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

## Searching Email Messages

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

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

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

## Deleting Email Messages

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

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

- Move to Deleted Items folder - When items are deleted they are moved to the Deleted Items folder. If the Deleted Items folder does not exist, it will be created automatically the first time you delete a message.
- Auto-purge folder - When using IMAP or webmail and messages are deleted from a folder, they are only marked as deleted. Messages are not physically removed from the folder until they are purged. This option will automatically purge the folder after deleting the message. Note:

When deleted messages are purged, the action is final. You will not be able to retrieve these messages later.

- Mark as deleted - When the message is deleted with this option, the message remains in the current folder, but will be crossed out and marked as deleted. If the folder is then purged, all items marked for deletion will be removed.
- Mark as deleted and hide - With this option, any message that has been marked as deleted will be hidden from view in webmail. This will allow you to keep deleted messages without seeing them every time you log into your mailbox. Note: It is important to keep an eye on your email account disk usage when using this option, as your mailbox may be fuller than you realize.

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

## Undeleting Messages

Didn't mean to delete a message? You can retrieve deleted messages from your Deleted Items folder as long as the system hasn't been purged yet. Just open the Deleted Items folder and select the desired message(s). Then drag the selected message(s) to your Inbox or another folder. Note: Your system administrator can permanently remove the messages in your Deleted Items folder at any time without warning, so don't delete messages if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted messages.

## Effects of Folder Auto-clean

Your system administrator may have established auto-clean policies that may delete older junk e-mail, deleted items, and/or sent items when these folders get too large. However, they may have left the option available for you to override auto-clean settings. For more information, see Folder Auto-clean .

## Marking Email for Follow-up

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

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



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

## Finding Flagged Messages

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

## Removing a Follow-up Flag

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

## Linking Email to Tasks

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

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

## Finding Messages with Linked Tasks

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

## Managing Email Folders

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

- **Inbox** - All incoming messages automatically go to your Inbox folder. You can read you mail in the Inbox, then delete it, move it to another folder, or leave it in the Inbox. Note: If you have set up content filtering for your mailbox, incoming messages may bypass your Inbox per your content filtering settings.

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

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

- Follow-ups - When you mark a message for follow-up, the message appears in the follow-ups view for easy access. For more information, see [Marking Email for Follow-up](#) . Note: If you unmark a message for follow-up, it will no longer appear in the follow-ups view.
- Linked to Tasks - When you link a new task to a message, the message appears in the linked to tasks view for easy access. For more information, see [Linking to Email Tasks](#) .

## Creating Email Folders

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

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

To make your SmarterMail folders available from a third-party email client such as Microsoft Outlook, you will need to create a mail account with IMPA set as your incoming mail server type. If

you use POP mail, you only have access to your SmarterMail inbox, not any personal mail folders you created to organize messages.

## Moving Messages to Another Folder

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

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

## Renaming and Deleting Folders

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

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

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

## Message Archive Search

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

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

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

For more information on archiving, see Message Archiving .