



# Accounts

Help Documentation

# Accounts

## Users

This settings page is only available to Domain Administrators.

The Users section is where a Domain Administrator can manage the user accounts on their domain.

This document explains the actions that can be taken on user accounts, including the ability to import users, improve the search functionality for a user by reindexing their account, enabling or disabling the MAPI/EWS and/or EAS synchronization add-ons, and more.

More information is available for adding new users as well as Managing Users .

To access the Users section, log in to SmarterMail as a Domain Administrator and click on the Domain Settings icon. Then click on Accounts in the navigation pane. The Users tab will load by default.

Jump To:

- Adding new users
- Import from CSV - Import new user accounts from a CSV file.
- Import from LDAP - When enabled, this allows a Domain Administrator to import new user accounts from Microsoft's Active Directory.
- Export All to CSV - Export a CSV file of all users on the domain.
- Reindex - Reindexes users/accounts to improve the search functionality for a user by reindexing their account.
- Refresh Disk Usage - Recalculate the disk usage for one or more user accounts.
- Expire Password - Force a user to change their password on their next webmail login.
- Enable EAS - This will give the selected User(s) the ability to set up Exchange accounts on mobile email clients, contacts and calendar apps, etc.
- Disable EAS - This removes the EAS capabilities for the account(s).
- Enable MAPI/EWS - This will give the selected User(s) the ability to set up Exchange accounts in Microsoft Outlook for Windows, Outlook for Mac, Apple Mail and will sync the account to eM Client.
- Disable MAPI/EWS - This removes the MAPI/EWS capabilities for the account(s).

## Users

The Users tab lists all users created on the domain, as well as some basic information about each user.

This information includes:

- Account - The username, or name that appears to the left of the "@" symbol in the email address.
- Name - The Display Name set for the User.
- Type - The "Role" of the User: User, Domain Admin or Primary Admin.
- EAS - Whether or not the EAS add-on is enabled for the User. If there is a checkmark here, this add-on is enabled.
- MAPI/EWS - Whether or not the MAPI/EWS add-on is enabled for the User. If there is a checkmark here, this add-on is enabled.
- Enabled - Whether the User is allowed to send/receive email (Enabled) or not.
- Last Login - The last date and time the User logged in to webmail.
- Disk Usage - The total amount of disk space being used versus their limit.

In addition, each User has a series of actions that can be performed. These are available by clicking on the Actions (...) button and include:

## Import from CSV

To add new SmarterMail users via a CSV spreadsheet, click on the Actions (...) button then click on Import from CSV. Upload the CSV file that contains the user information and click Next. The first page of the import modal will allow you to map the CSV column headers to the appropriate configuration option within SmarterMail. For example, if your CSV contained a column header for "user name", you can select the "Username" mapping.

At minimum, the CSV file must contain a "Username" column header. All remaining account configuration options will mimic the domain's User Defaults template. If no "Password" column header is provided in the CSV, the import modal will prompt you to create a temporary password for the user(s) being imported. Those users will be prompted to change their password the next time they log into the webmail interface.

## Import Users From LDAP

This feature is only available to Domain Administrators using SmarterMail Enterprise.

The Lightweight Directory Access Protocol (LDAP) is, as the name implies, a lightweight client-server protocol that email servers, software and network appliances can use to connect to, and look up information from, a directory service. For example, LDAP can be used to look up information from Microsoft Active Directory.

For its part, SmarterMail acts as an LDAP client. That means LDAP can be used to integrate SmarterMail with Microsoft Active Directory for lookup and authentication services. The LDAP integration between SmarterMail and AD via LDAP is, therefore, one-way: SmarterMail can look up

information within Active Directory but it can't send information TO Active Directory. So, when Active Directory is used as an authentication method for users, if the user changes their password, display name or other information in SmarterMail, that change is NOT synced back to Active Directory. However, if that same information is changed in AD, it will sync back to SmarterMail.

Follow these steps to import new users using LDAP:

- Log into SmarterMail as the domain administrator.
- Click on the Domain Settings icon.
- When the domain settings load, click on Accounts in the navigation pane. All existing accounts will load in the content pane.
- Click the Actions (...) button.
- From the dropdown menu, click Import from LDAP . A modal will appear.
- Input the location of your active directory users via the LDAP binding string. An example LDAP string might look like this:

```
LDAP://testdomain.local/CN=Users,OU=Company,DC=testdomain,DC=local
```

- If you want to use the LDAP email address as the username for the imported accounts, enable it.
- Click List Users .
- Select the users you wish to import into the domain. NOTE: If any users, aliases or mailing lists already exist in SmarterMail they will not show up in the LDAP list.
- Click Import to begin the import process.

Note: LDAP integration will only function if SmarterMail is on the same domain as the LDAP server you are trying to connect to.

## Export All to CSV

To export a list of all user accounts on the domain, click on the Actions (...) button then click on Export All CSV . The CSV file will contain a variety of details about the user accounts, including their username, display name, authentication method, home and work address, disk usage, and more.

## Reindex

If a user reports errors or a lack of results when performing a search, it may be necessary to reindex their user account, which will regenerate the mailbox index file. To reindex one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Reindex .

## Refresh Disk Usage

This option can be used to recalculate the disk usage for the selected user(s). If you find discrepancies in the user's disk usage display throughout the various areas of the interface (in the email section, reports, or Users grid), use this option to recalculate and correct that display. Please note that there may be no visual effect if the disk usage numbers shown were already correct. To refresh the disk usage for one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Refresh Disk Usage .

## Expire Password

This option can be used to expire the password of one or more users, forcing the user(s) to change their account password the next time they log into the webmail interface. To expire the password of one or multiple users, checkmark the desired user accounts, click on the Actions (...) button, then click on Expire Password .

Note: If password changes were disabled for a user, expiring the user's password will automatically enable password changes and expire their password. They will be required to set a new password next time they log in. In addition, accounts set to Active Directory authentication cannot be expired.

## Enable/Disable EAS

EAS is the industry standard for synchronizing mobile devices to SmarterMail, in addition to some desktop email clients. It uses direct push technology to sync email and collaboration items to variety of mobile devices, including smartphones and tablets, as well as Windows Mail, which ships as part of Windows 10.

If a Domain Administrator is given the ability to manage EAS mailboxes -- that is, add and remove EAS functionality for Accounts -- then these options will be available once a account, or several accounts, are selected.

## Enable/Disable MAPI/EWS

MAPI is Microsoft's "Outlook protocol". That means it is the foundation by which Outlook on Windows does things like share tasks, calendars and email folders; set up meetings; create contact groups and much more. EWS is a similar protocol, but one that was developed specifically for integration with the Apple ecosystem. While other, non-Mac email clients have adopted EWS (e.g., eM Client), it primarily works with Outlook for Mac and Apple Mail.

What makes SmarterMail's use of MAPI different than its competitors is that SmarterMail has native, server-level integration of MAPI, just like Microsoft Exchange. Other products use separate pieces of software that are installed on client machines to "emulate" Exchange functionality. These "Outlook

Connectors" don't provide the full suite of Exchange features to Outlook. In addition, they're another piece of software that a client has to install, and that mail administrators or IT staff have to manage.

If a Domain Administrator is given the ability to manage MAPI/EWS mailboxes -- that is, add and remove MAPI/EWS functionality for Accounts -- then these options will be available once a account, or several accounts, are selected.

## Managing Users

This settings page is only available to System Administrators and Domain Administrators.

The Users section is where System and Domain Administrators can add, view and modify the user accounts on a domain, where each account represents a person's actual mailbox and email address (ex: jdoe@example.com). Administrators can modify basic configuration options for a user, including their password method, features they can access, reply-to addresses, webmail preferences and more.

For a better understanding of the actions that can be performed in the Users section, see the Users Overview page.

To access the list of users on your domain, log in to SmarterMail as a Domain Administrator and click on the Domain Settings icon. Then click on Accounts in the navigation pane. The Users tab will load by default.

Jump to:

- Account
- Service Access
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- Forwarding
- User Groups
- Throttling

### Account

- Username - The identifier the user uses to login to SmarterMail. To change an account's username, click on the Actions (...) button and then Rename .
- User Status - Domain administrators can change the status on a mailbox to limit a user's access as needed. For example, if a user leaves the company, either voluntarily or not, a domain administrator can suspend the account pending further review by company management.

Options include:

- Enabled - The mailbox is in use by the user.
- Disabled and allow mail - The mailbox continues to receive email but the user is unable to access their mailbox.
- Disabled and don't allow mail - The mailbox no longer accepts incoming messages and the user is unable to access their mailbox.
- Display Name - The friendly name that is displayed on outgoing messages.
- Authentication Mode - The authentication method used to login: SmarterMail or Active Directory. To change a user's password when using SmarterMail verification, click on the Actions (...) button and then Change Password . When using Active Directory, changes to a user's password must be done in the directory itself.
- Active Directory Username - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Active Directory username to authenticate against for Active Directory authentication.
- Domain - If Active Directory is selected for the Authentication Mode, this field will appear. Enter or adjust the Domain to authenticate against for Active Directory authentication.
- Mailbox Size Limit - The maximum size of the mailbox. By default, the maximum mailbox size is 100 MBs. However, domain administrators can change this to whatever they like to correspond to company limits. For unlimited disk space, type in 0.
- Domain Administrator - Enable this setting to make this user one of the Domain Administrators for the domain, which allows the user to create new users and edit domain-wide settings.

## Service Access

This card can be used to adjust a user's access to the standard protocols that SmarterMail utilizes. For example, you can limit services like POP, IMAP and SMTP so that specific users are not able to connect their email accounts to external email clients. The following services can be managed for each user:

- Webmail - Enable this option to allow users to log into SmarterMail from the webmail interface.
- POP - Enable this option to allow the user to download mail to an email client using POP3.
- IMAP - Enable this option to allow the user to create a two-way email sync between SmarterMail and an email client using IMAP.
- Inbound SMTP - Enable this option to allow users to receive email from external domains.
- Outbound SMTP - Enable this option to allow users to send email to external domains.
- Chat (XMPP) (Enterprise Only) - Enable this option to activate SmarterMail's included Group Chat feature for Users.

- External SMTP Accounts - Enable this option to allow users to send email from a third-party mail server account right from within SmarterMail. For example, if a user has a second email address that they regularly use, enabling this option would allow the user to set up an SMTP Account for that address and choose which account to send from when composing new messages.
- EAS (Enterprise Only) - This will give the users the ability to set up Exchange accounts on mobile email clients, contacts and calendar apps, etc.
- MAPI/EWS (Enterprise Only) - This will give the User the ability to set up Exchange accounts in Microsoft Outlook for Windows, Outlook for Mac, Apple Mail and will sync the account to eM Client.

## User

- Language - The language selected for Users in SmarterMail is EXTREMELY important. That's because it's much more than simply what is seen in the webmail client when that User logs in. SmarterMail's language selection is the basis for everything: the things seen in the webmail interface as well as what's returned to an email client when connecting using Outlook, eM Client, iOS Mail and more. That includes things like settings labels, folder names, calendars and calendar appointment, contact groups, email message content, log files and essentially everything within SmarterMail. Therefore, it is extremely critical select the proper language for a User. For more information, see Languages, Protocols and Clients
- Changing Language Settings : When a user tries to update their language, SmarterMail checks for potential conflicts prior to changing the language. For example, if a user is set to English and they have a folder named "Bandeja de entrada", if they try to change their language to Spanish, the change will not be saved and they will see a warning letting them know that the language wasn't updated to prevent an email folder name conflict. This is because "Bandeja de entrada" is the Spanish name for Inbox used in the default Spanish language translation file. If the change was saved, there would be 2 folders with the same name, which would cause issues.
- Time Zone - The time zone to use for marking the sending and receiving date and time.
- 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. While it's possible to set the Reply-to address or a user, that user can change the Reply-to when composing a message or reply in an email client, such as Microsoft Outlook. Should they do this, that address will take precedence over what's set in the user's settings.
- Recovery Email Address - The email address to which password reset instructions will be sent if the user forgets their account password. This address should be separate from the SmarterMail account, such as a Gmail or Yahoo! address, or even the default email address of a Domain Administrator. Note: The backup email address can only be used if the System Administrator



has enabled password retrieval for the login page. If the account is protected by 2-Step Authentication, this address may also be used to retrieve the 2-Step verification code.

- **Plus Addressing** - Plus addressing allows users to automatically sort incoming email without creating content filtering rules first. A major benefit of plus addressing is that it allows users to generate special email addresses if they do not want to give out their real 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 following address: user+technewsletter@example.com.

When the newsletter is delivered, it can automatically be routed to the Technewsletter folder. If the folder does not already exist, it can be created automatically. Note: For plus addressing to work, the plus (+) sign is required AFTER the username but BEFORE the domain name. For example, username+foldername@domain.com.

- **Disabled** - Select this option to turn off plus addressing for the account.
- **Move to Folder** - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, it will be created automatically. Note: To prevent abuse, no more than 10 folders can be auto-created in this method during a six hour period.
- **Move to Folder (If Exists)** - If the target folder already exists, the incoming message will be placed into it. If the folder does not exist, the email will be placed in the Inbox.
- **Leave in Inbox** - The incoming message will be placed in the Inbox.
- **Calendar Auto-Clean** - SmarterMail allows domain administrators to keep users' past calendar events from cluttering up calendar views. By default, this is set to Domain Default, which follows the policy set by the Administrator for the domain. However, you can adjust this policy per user, as needed.
- **Disable password changes** - Select this option to prevent the user from changing the login password. This setting overrides the password expiration found in Security settings. A user's password will not expire or be required to be changed if this setting is enabled.
- **Show in Global Address List** - This setting is enabled by default and allows the user account to be displayed in the Global Address List, which is found in the Contact section. This option is useful for only displaying accounts that are tied to real people as opposed to addresses used by departments, such as support@example.com. Note: This option is only available when using SmarterMail Enterprise.

## Webmail

- **Delete Email Action** - To specify the action performed on deleted messages, select the appropriate action from the list. NOTE: This action only affects messages. If folders are deleted, the folder and its contents will always go to the Deleted Items folder.

- Move to Deleted Items folder - Deleted items will appear in the deleted items folder, which will need to be regularly emptied.
- Permanently Delete - 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 does not move messages to the Deleted Items folder and messages remain until the folder is purged.
- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list. By default, SmarterMails sets the encoding to Western European (ISO). However, SmarterMail supports encoding for over 35 different text formats, thereby supporting encoding for most parts of the world.
- Compose Font - Specify the default font for emails by selecting an option from the list.
- Font Size - Specify the default font size for emails by selecting an option from the list.
- Search Language Indexer - The language that the Lucene indexer will index against. In most cases, Generic Indexer is the best selection as it incorporates English and common umlauts. However, if the user views the interface in certain languages, such as Chinese, Japanese, or Korean, this setting should specify the language for better indexing results.
- Use To: address for replies - When enabled, replying to a message via webmail will use that email's To: field as the Send From address of a reply, regardless of whether the message was sent to a specific SmarterMail email address or a domain alias, email alias, SMTP account, disposable address or plus address. For example, if an email is sent an alias, replies to that email via webmail will automatically use the email alias address of the Alias member as the Send From address. (This setting does not prevent a user from manually changing the Send From address when composing a message.)
- Request read receipts by default - Select this option to automatically request read receipts for all outgoing messages sent via webmail. When this setting is enabled, all outgoing messages that are sent via webmail will request that the recipient(s) send a read receipt when the message has been read. If the read receipt is sent by the recipient(s), the user will receive a message from the System Administrator confirming that the message has been read. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.
- Request delivery receipts by default - Select this option to automatically receive delivery receipts for all outgoing messages sent via webmail and email clients. When this setting is enabled, the user will receive a message from the System Administrator stating the status of their outgoing message. Note: Users should be careful when enabling this feature and should only do so if required for business or compliance or regulatory requirements.
- Mark messages downloaded by POP as read - Select this option to mark all messages that are downloaded via a POP3 connection as read.

- Show images from external websites - Enable this option to automatically display all in-line remote content when an email is viewed. (Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in the message.) When this is enabled, the user will not have to manually display the remote content on emails they receive; it will be visible automatically. Note: Emails from trusted domains and senders will always display remote content automatically.

## Forwarding

If this card is not displayed, your domain has not been permitted to utilize automated forwarding. To display these options, a System Administrator must enable the Automated Forwarding feature for your domain. NOTE: These settings only affect webmail. If it's been disabled for your domain, forwarding may still occur when using Events and/or content filters, or when using an email client.

- Forward all email to another address - Select this option to allow the user to utilize the automated forwarding feature and to display the forwarding settings. If this setting is disabled, the Forwarding card will not be displayed in the user's Account settings.
- Forwarding Address - The email address to which messages sent to the mailbox will be automatically forwarded. Note: Messages routed to other email folders via content filters or plus addressing will also be forwarded to this address.
- Forward Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
  - Normal - Includes original content, including font styles from original message, as part of the new message.
  - Text - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links, fonts or other formatting.
  - Embed as Attachment - Attaches the original message to the new message as an attachment. The message will not appear in the body of your message.
  - Delete messages when forwarded - Select this option to delete messages from the SmarterMail mailbox after they are forwarded.

## User Groups

User Groups are used to give a specific subset of users on the domain permission 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.

If any User Groups have been created, they'll be listed here and can be set to On or Off for specific users.

## Throttling

Throttling limits the number of messages sent per hour and/or the amount of bandwidth used per hour to send messages. Domain administrators can use this feature on a per user basis to either delay or reject messages that exceed their desired limits, thereby ensuring users don't send out massive amounts of email throughout the day that can possibly get the domain blacklisted.

Note: For each threshold and action, you'll see "(Default = X)" which indicates the throttling policy that's put in place by the System Administrator for the ENTIRE domain. It's important to consider the domain's throttling limits when modifying a specific user's limits. For example, if you set the user's throttling limit to the domain max, and that user sends that many messages in an hour, the WHOLE domain would be throttled. This means that outgoing messages from all users on the domain would either be delayed or rejected, depending on the domain's throttling action.

- Outbound Messages per Hour (0 = Unlimited) (Default = 5000) - The number of messages sent by the user per hour.
- Message Throttling Action (Default = None) - Select an action for SmarterMail to take once the particular thorttling level is reached. Of course, administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of mail being sent falls beneath the throttling limit that is set.
- Outbound Bandwidth per Hour (0 = Unlimited) (Default = 100) - The total number of MBs sent by the user per hour.
- Bandwidth Throttling Action (Default = None) - Select an action for SmarterMail to take once the particular thorttling level is reached. Of course, administrators can elect to do nothing at all, or they can either Delay or Reject messages until the amount of bandwidth being used falls beneath the throttling limit that is set.

## Aliases

This settings page is only available to Domain Administrators.

An email alias is essentially a forwarding email address that can be used to forward messages to a single address or multiple email addresses. Aliases are most commonly used for departments or groups of individuals, like a small team of people working on a project or task. 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.

Note: Even though an alias acts as an email address, users cannot login to an alias like they do a standard email address; there is not a mailbox associated with the alias and no email is ever actually

stored for the alias itself. Instead, emails are simply sent to the list of addresses provided for the alias and are stored in the mailboxes of the individual users.

To access the email aliases for the domain, log in as a Domain Administrator and click on the Domain Settings icon. Click on Accounts in the navigation pane, then Aliases tab.

To create a new email alias, click New . Whether creating a new alias or editing an existing one, 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 want to use the email alias address "info@example.com", you'd simply use "info" for the Name. (You do NOT need to add the domain to the end of the name -- that's supplied automatically.)
- Display Name -- This is the friendly name used for the Alias. When used in conjunction with "Allow alias users to send from this alias", this is the display name that appears as the sender in the recipient's inbox.
- Email Addresses (one per line) - Type the full email address(es) of the user(s) who should receive emails sent to this alias.
- Internal use only - Enable this option to only allow emails to be delivered to accounts that are hosted within the same SmarterMail server.
- Include all domain users - Enable this option to include all domain users automatically in the alias. Note: This option does not override the email addresses listed in the Email Address box. If selected, all domain users will be included in addition to the users entered in the Email Addresses text box.
- Alias can be used as from address in webmail - Enable this option to allow alias users (those users/accounts that are part of the alias) to manually change their From address to the alias email address on new emails and replies. When a user sends mail as an alias, the recipient will see the alias's Display Name as the email friendly from address. If the Display Name for the alias is blank, the user's Display Name shows.
- Show in Global Address List - Enable this option to display the alias in the Global Address List. Note: This feature is only available when using SmarterMail Enterprise.
- Show as a room in chat (Enterprise Only) - Enable this option to allow the alias to appear as a room in Group Chat. Enabling aliases for chat means that instant messages can be sent to the alias, and everyone in that alias, from within webmail as well as when using third-party chat clients.
- Use as domain catch-all - Enable this option to use the alias address as a catch-all account for the domain. A catch-all alias is an email address that will catch any incoming email sent to an invalid address on a domain. Instead of bouncing the message back to the sender, the message will be stored in the mailbox that is assigned as the catch-all account. Note: This option will

only be visible if the System Administrator has enabled catch-all as a feature for the domain. In addition, only one email alias can be assigned as the domain catch-all at a time. Enabling a different alias as the catch-all will override any assignment already in place.

### **A Note About Catch-All Aliases**

A catch-all alias is simply that: an alias that catches all email sent to a domain that doesn't correspond to an actual account. Catch-all aliases can be useful as long as they are monitored and kept clear of unwanted email. However, due to the nature of email and the amount of spam that is sent every day, a catch-all can become a burden to email systems and to domain administrators. Therefore, it is suggested that they be used sparingly, or not at all if it can be avoided. Furthermore, it is important to never set an autoresponder on an email account that the catch-all forwards to, as it may result in backscatter, causing additional bandwidth usage and potentially causing your domain to be blacklisted.