



# Filtering

Help Documentation

## Filtering

### Folder Auto-clean

Setting up auto-clean rules for your email folders is a simple, yet effective, way to limit how much of your account disk space is used by the Junk E-Mail, Sent Items, Deleted Items and/or any custom folders you created. By placing limits on the size of these folders, or by automatically deleting mail older than X number of days, you can help ensure that your email account does not fill up unnecessarily. In addition, if you want to set a size limit on a folder, messages are deleted in the order that they were received so that older messages get deleted first.

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

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

### Options

Use this tab to specify the following options:

- Use default auto-clean settings - Select this checkbox to adopt the auto-clean policy set by your email host or domain administrator. Note: If the administrator changes the policy, yours will automatically change as well.
- Override auto-clean settings for this account - Select this checkbox to override the settings set by your administrator so that you can create your own rules. Any changes you make will not be affected if the administrator changes their policy, unless they disable your ability to create your own rules.

### Rules

If you are using the default auto-clean settings set up by your administrator, this tab will be greyed out and you will not be able to click on it to open it. If you chose to override the settings, and if your administrator allows you to override the default settings, this tab will be active. In addition, if there are custom rules already created, a number will appear next to the Rules name on the tab showing how many rules there are. Once you open it and you can click Add Rule in the content pane toolbar to create your own auto-clean policies based upon size or date.

#### Auto-clean by Size

These options will be visible if you set up the rule by folder Size :

- Folder - This dropdown will show you all folders for your mail account.
- Type - This allows you to create rules based on folder Size or by Date.
- Start Auto-Clean - The size the folder needs to reach BEFORE the auto-clean rule will run.
- End Auto-Clean - The size the folder will be reduced to once the auto-clean rule finishes.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Once the rule is saved, it will display on the Rules tab as follows:

- Folder - The folder the rule was created for.
- Type - The rule type, either Size or Date.
- Settings - A description of the rule. For example, if you set a Size rule to start when a folder is 10MB and to reduce the folder to 5MB, the Settings will show as "Over 10MB, reduce to 5MB"

### **Auto-clean by Date**

These options will be visible if you set up the rule by Date :

- Folder - This dropdown will show you all folders for your mail account.
- Type - This allows you to create rules based on folder Size or by Date.
- Mail Age - This allows you have mail that is over a certain number of days old automatically deleted from the folder.
- Enable auto-clean for this folder - Select this box to activate auto-cleaning of the selected folder.

Once the rule is saved, it will display on the Rules tab as follows:

- Folder - The folder the rule was created for.
- Type - The rule type, either Size or Date.
- Settings - A description of the rule. For example, if you set a Date rule to run on mail that is over 120 days old, the Settings will show as "Over 120 days old"

## **Content Filtering**

Content filtering is a great way to perform actions on emails that meet specific criteria. For example, you can use content filters to delete messages with certain attachments (e.g., attachments with a .exe extension), forward messages from a specific email address to another account, or even alter the subject of specific types of email. Content filters are most commonly used to organize email by moving messages to specific folders. However, content filtering is extremely flexible and allows 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. Note: If you have blocked any senders in your Inbox, there may be a content rule that was automatically created as a result of that action.

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 appear in the list . Therefore, when a content filter gets triggered and performs an action on a message, 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 the wizard will walk you through each step necessary to create the filter. You can go back and forward within the wizard, and a rule will only be created when you actually Save it.

### 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. Note: If you select a filter or action that requires an value to be entered and the field is left blank, SmarterMail will ignore this rule.

### Step 2 - Filter Type and Criteria Details

Choose whether this filter uses the "And" modifier, meaning it requires all criterion to be met from each and every section, or the "Or" modifier, meaning just one or more of the criteria in any section needs 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" or the yesbox to no.

### 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.

Then, choose one or more actions to take when a message matches this filter. The available actions are explained below:

- Mark as read - Automatically marks the messages as read, which means it will not show up in your inbox, or any other folder, as unread.
- Mark as follow-up - Automatically flags the message for follow-up. This makes it easy to find messages that have been acted upon by your content filter.
- Delete message - Deletes the message so that it will never arrive at your Inbox. Note: 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 - 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 - Will append a prefix to the subject line of the email. This is useful for categorizing emails as the subject line will be altered to include the text you specify in the Comment box.
- Add Header - Includes an email header into the message, which can be useful when performing additional filtering through Outlook or another email clients. 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. Unlike "Copy message", this option will not store a copy of the email in your own account.
- Set Priority - Will automatically elevate the priority of a message. For example, if you create a content filter that flags a message from a VIP, you may want to set the priority of the message to High as well to denote its importance.

Once the content filter is created, click Save to actually make the filter active. You can move back and forth throughout the wizard as well in order to check, and double check, your settings.

## Content Filter Types

### From Address

- From specific addresses
- From specific domains
- From trusted senders

### Contains Specific Words or Phrases

- Subject
- Body
- Subject or Body
- From Address
- To Address
- Email header
- 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 address)
- Spam probability
- Flagged as high priority
- Flagged as normal priority
- Flagged as low priority
- Message automated (no return address)
- Sender authenticated

## Spam Filtering

SmarterMail includes many antis spam measures that will help keep your inbox free of unwanted mail. In most cases, your system administrator, or even your domain administrator, already has some basic spam filtering options set up. However, you can certainly modify those settings to further filter out potentially unwanted email.

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.