



Help Documentation

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SmarterMail Help

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

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

Common Help Topics for Users

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

Common Help Topics for Domain Administrators

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

Getting Started

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

- Download the SmarterMail installation file from the SmarterTools website .
- Run the InstallShield Wizard. Note: Users of Windows 2003 Advanced Server need to install SmarterMail from Add/Remove Programs in the control panel to properly set file permissions.
- If you are running IIS 5.0 or later, convert the SmarterMail Web interface to run under IIS. For more information, see Running SmarterMail as an IIS Site .
- Activate SmarterMail, if necessary. Upon logging in as the administrator for the first time, the product will run as the Free edition. To activate the Professional or Enterprise edition of the software, you will need a valid license key. For more information, see Activating SmarterMail .
- Add a domain to SmarterMail. For more information, see Create a New Domain .
- Configure the DNS settings for the domain. For more information, see the KB article How To -- Configure DNS for a Domain .

General Information

What is SmarterMail?

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

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

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

How SmarterMail Works

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

Web Interface

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

Windows Service

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

SmarterMail Web Server

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

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

Browser Requirements

SmarterMail is fully supported by the browsers below.

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

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Product and Component Acknowledgements

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Interface components produced by•



Charting component produced by



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Release Notes

Current release notes are available at

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

Installation and Deployment

SmarterMail System Requirements

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

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

However, SmarterTools recommends the following requirements for maximum efficiency:

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

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

*Microsoft's non-server based operating systems limit the maximum number of inbound connections

to 10. For more information regarding this issue, refer to the Windows Vista EULA or the Windows XP Pro EULA .

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

Installation

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

Please refer to the KB article How To - Install SmarterMail for step-by-step installation instructions.

Running as an IIS Site

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

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

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

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Activating SmarterMail

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

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

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

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Upgrading SmarterMail

Because the SmarterMail 6.x download contains all of the installation files needed for any licensing level or edition, upgrading editions or levels is relatively easy. With a valid license key, companies can easily upgrade to the professional or enterprise editions or increase the number of mailboxes available in SmarterMail. For more information, see the [Activating SmarterMail](#) section of the online help. For step-by-step instructions, please refer to the KB article [How To - Upgrade SmarterMail Levels and Editions](#).

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

SmarterMail Add-ons

SmarterTools' add-on licensing system allows users to enhance the functionality of SmarterTools products. The following add-ons are available for SmarterMail 6.x:

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

Microsoft Exchange ActiveSync

Microsoft Exchange ActiveSync is a data synchronization protocol that enables over-the-air access to email, calendars, tasks, and notes from most mobile devices, including Blackberry, iPhone, Palm Pre, and Windows Mobile devices. For more information, see [Microsoft Exchange ActiveSync](#).

Commtouch Premium Antispam

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

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

Commtouch Zero-hour Antivirus

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

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

SmarterMail Deployment Guides

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

Individuals and Micro-businesses

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

Small to Medium-sized Businesses

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

High-volume Deployments

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

Automation with Web Services

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

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

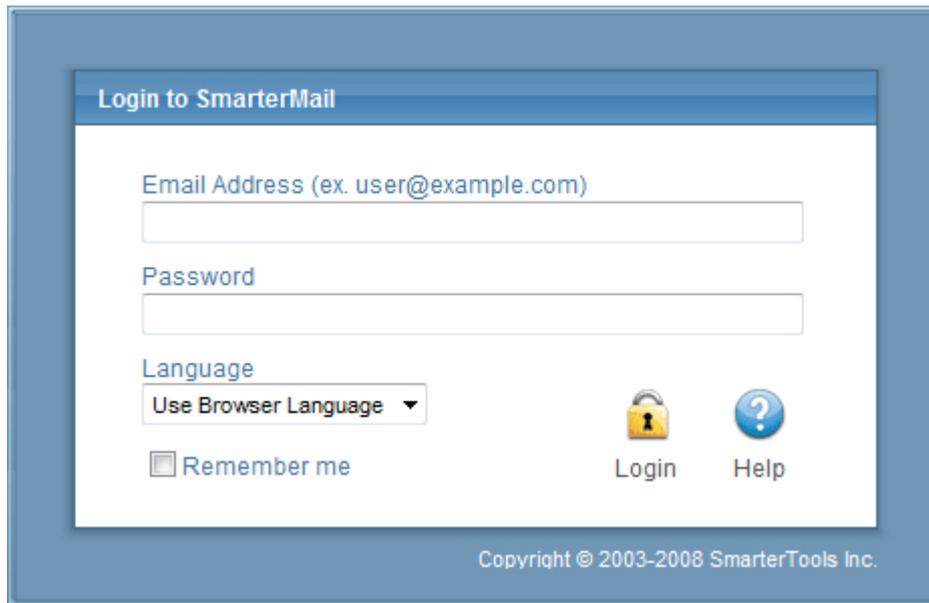
To view the Web services and the corresponding functions available to you, go to your default Web interface install location and append "services/SERVICENAME.asmx". With the default installation, you would use `http://127.0.0.1:9998/Services/svcServerAdmin.asmx`.

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

Help for Email Users

How to Login to SmarterMail

You will need to obtain the link to your SmarterMail server's web site from your Administrator or Domain Administrator.



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To login to SmarterMail, type in your full email address and password on the login screen. If everything matches up, you will be presented with the welcome page and a view of all folders in your mailbox. Alias names cannot be used to log in.

One thing to notice on the Login page is the "Remember Me" checkbox. By checking this box SmarterMail encrypts your login and password, then you can close the browser window and not have to re-log in when you return. This function works as long as you do not "log out" of SmarterMail prior to closing your browser window. If you do log out, you will have to log back in upon your return, regardless of whether the "Remember Me" box was checked or not. You will need cookies enabled on your browser for this feature to work.

If you have issues with your email account, first 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.

Welcome to SmarterMail

The first time you log in to SmarterMail, you will be presented with several options. These options can be modified at any time through the My Settings page once you are logged in, but are required to be set in order to provide you with a better email experience.

Time Zone - Setting your time zone will make it so that all emails show the correct time they came in. SmarterMail automatically adjusts for Daylight Saving time. By default, this should be set to the time zone that your domain administrator has chosen.

My Today Page

The My Today page gives you an overview of your entire account.

Calendar - lists upcoming events on your calendar.

Latest RSS Items - list recent updates to RSS feeds you are subscribed to.

Inbox - lists how many unread messages you have.

Disk Space Limits - lists how much space is available and how much space is being used in your account. Press the "Clear Junk E-Mail Folder" link to remove all items from your Junk e-mail box.

Tasks - lists unfinished tasks.

The My Today page is the default page to load when logging into your account. If you would rather go straight to your Inbox you can change it by clicking on the Settings button on the main toolbar, then selecting Account Settings in the My Settings tree view, and finally choosing the Webmail tab and changing the "Initial Page on Login" setting.

Email

Email Overview

SmarterMail has many features that allow you to access your email in an easy fashion. The topics in the help will assist you to understand how to use the most common features in SmarterMail.

When you log in, your inbox or the My Today Page will display in the content pane. To view the contents of another folder, click on the appropriate folder in the left tree view.

Working with Email in Your Inbox

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 it in a pop-up window.

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 four 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; and the envelope with a red arrow indicates a forward.

- 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.

Disk Space Indicator

This indicator may appear if your administrator has specified limits on the amount of disk space that the email account can use. When you start to get close to your limit, it is recommended that you clean out any old messages that you no longer need, especially those in Junk E-Mail, Sent Items, or Deleted Items. Clicking the indicator will take you directly to the Disk Usage Summary Report.

Actions

In general, the following options are available in the actions toolbar:

- Mark - Allows you to mark the selected message(s) as read, unread, 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.
- Spam - Marks the selected message(s) as spam. In most folders, choosing the Mark as Spam option will delete the message and add it to a list of spam messages for better spam protection later. This type of spam filtering, in which you actually "teach" the mail server what you consider unwanted email, is known as Bayesian filtering. It is to your benefit to mark spam rather than just deleting it because it helps your mail server avoid that type of mail in the future. Note: If you are using 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 - Allows you to move the selected message(s) to any available inbox folder. Note: You can also drag-and-drop messages to an available folder.
- Delete - Allows you to delete, undelete, purge deleted messages, or delete all messages in a folder.
- Delete - Deletes the selected message(s). The action taken when a message is deleted is dependant upon the option chosen in Settings. For more information, please see [Deleting Messages](#) .
- Undelete - If you have chosen in your settings to mark messages as deleted, rather than purging them, then you will be able to undelete any deleted items that still appear in your message list. Note: You cannot undelete purged email.

- Purge Marked as Deleted - This option permanently removes all messages that are marked as deleted. This option cannot be undone.
- Delete All Messages in 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.
- Search - Allows you to search for a specific message. For more information, please see Search Messages .

Note: Depending on the folder you are viewing and the settings you have on your account, some of these options may not be available.

Create a New Message

There are several ways to compose a new message in SmarterMail. The most common method is to click New Message in the left tree view. This will open a new message window and the following options will be available in the actions toolbar:

- Send - Sends your message to the designated recipients.
- Save as Draft - Saves the message in its current state to the Drafts folder. If you do not have a Drafts folder, one will be created automatically the first time you choose this option. You will then be able to go back to your Drafts folder and continue composing this email.
- Cancel - Cancels the message and closes the new message window.

Compose

Use this tab to specify the recipients, message subject, and to write the email message.

- To - Type the email addresses to which the message will be sent. Separate multiple contacts with a semicolon (;). Note: 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.
- Cc - Type the email addresses of recipients that should receive a carbon copy of the message.
- Bcc - Type the email addresses of recipients that should receive a blind carbon copy of the message. 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 - The subject of the email.

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.

Attachments

Use this tab to add attachments to the email. Note: You must click Upload to attach the file. It is also important to remember that many email systems limit attachment size.

Options

Use this tab to specify the importance of the message or to request a read receipt. By default, messages have a normal level of importance.

Preview Use this tab to preview the message in HTML format.

Reading a Message

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 it in a po-pup window.

At the top right hand corner of the reading pane, there are four icons—Reply, Reply All, Forward, and Print. Each of these icons are actions that can be performed on the message you are currently viewing. To the left of these you will see the header of the email. This contains information about the email message like the sender, subject, and the date the message was sent. Underneath the header you'll find the body of the message. Each of these sections will be explained below.

Action Buttons

Reply - Opens up the compose page that lets you respond to the sender of this message. In addition, the text of this message will be filled in to the new message as well.

Reply All - Operates similarly to the Reply button, but it also adds any email addresses in the To or CC fields to the response as well.

Forward - Opens up a new window and allows you to forward this message to someone else. The method used to forward the message can be customized by several settings in the Settings page.

Print - Prints the contents of the email without all of the extra navigation controls on the page.

Email Information Header

Date - Time and date the message was sent.

From - Email address from which the message was sent.

To - The email address(es) of the primary recipients of the message.

Cc - The Cc field should contain recipients that should receive "carbon copies" of the message, but are not the primary intended recipients of the message.

Subject - The subject of the message.

HTML link - Displays the message in HTML format, which allows for colors and fonts. The default method of viewing messages is HTML, but it can be changed from the Account Settings page.

Text link - Displays the message in plain text, which only allows text content with no special formatting or graphics.

Header link - 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 link - 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.

Attachments link - Displays links to download any attachments as individual files as a zip file that contains all attached items. Be very careful when opening attachments in emails. Ensure that you know the sender and do not open any attachments you are not expecting.

Searching Messages

SmarterMail provides an easy way to find the emails you are looking for. When viewing the messages in an email folder, click on the Search icon from the actions toolbar. When you do, a second bar will appear with various options you can use while searching.

Search Text - The first field is the text you are looking for. Frequently, this will be an email address or a part of an email subject.

Search Type - Choose the type of search from the drop-down box; You can search the from address, the subject, or the body text of messages.

Folder to Search - Choose the current folder, the current folder and subfolders, or all folders to search.

Messages to search - You have the option of searching All Messages, Unread messages, Replied to messages, or Forwarded messages.

Time Period - You have the option of choosing the time frame of which you received the messages. You can choose from the Last 30 Days, 90 Days, 6 Months, 12 Months, or All Time.

When you have entered all of the search criteria, click on the Find Now button. SmarterMail will then show you a list of all messages that match the search criteria, and you can click on a message to view it. If you want to start a new search with new criteria, click the Clear button.

Note: Very large folders will take longer to search, as will searching multiple folders at once. For faster searching, choose a specific folder before initiating a search.

Deleting Messages

SmarterMail has two different methods for deleting messages. First, you can delete a message while viewing it by clicking on the Delete icon from the actions toolbar. Second, you can delete multiple messages at once by checking them in the message list page and clicking the Delete icon from the actions toolbar.

The action SmarterMail takes when you delete a message depends on the option you choose in Settings page. Below are the options available for the option "When messages are deleted."

- Move to Deleted Items folder - (default) - When items are deleted they are moved to a folder called Deleted Items. 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 more full than you realize.

Note: The action taken for deleted items will ONLY be taken when deleting items through web mail. Deleting an item from Outlook Express or another email client will NOT use the setting that you choose.

Note to POP3 users: When your email client connects to SmarterMail via POP3, any emails that are marked as deleted are automatically purged. To prevent this from happening, use the "Move to Deleted Items folder" option to avoid accidentally purging deleted items.

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. In order to see what folders are currently set to auto-clean and to change these settings (when possible), refer to the topic [Folder Auto-Clean](#) .

Manage Folders

Utilizing folders in SmarterMail is the general method of storing messages that are both sent and received, either from within the web interface or, if you set it up properly, from your email client. Several folders have specific purposes, and you can also add other folders to store specific categories of mail. Common folders include Inbox, Drafts, Sent Items, Deleted Items, and Junk E-Mail.

To add or edit your email folders simply click on the Email icon on the main toolbar.

My Folders

Adding a Folder - A folder can be added a couple different ways. You can click the Plus Sign icon on the Folder toolbar; or move your mouse above a current folder, right-click, and choose **New Folder** . In both instances a new window will pop-up, allowing you to name your new folder.

Go To Folder - Click on a folder name to see the messages contained in the folder.

Rename a Folder - You can rename a folder by clicking on the folder you would like to rename and then clicking the Pencil icon on the Folder toolbar; or by moving your mouse over the folder that you would like to rename, right-click, and choose **Edit** . A new window will pop-up showing the current name of the folder, and a blank space will be available for a new folder name. Renaming folders is unavailable on folders that have specific purposes, like Inbox or Deleted Items.

Delete a Folder - First choose the folder you would like to delete. Then either click the Trash Can icon on the folder toolbar; or right-click and choose **Delete** . A new window will pop-up asking you to confirm your deletion. At that point you may either continue with the delete, or cancel it. Deleting folders is unavailable on folders that have specific purposes, like Inbox or Deleted Items.

Entering a Folder Name

Folder Name - Enter the name of the new folder. Using a backslash character '\' when naming a new folder(e.g. Family\mom) will create a sub-folder, which can be useful if you wish to sub-categorize your email. Only lower ASCII characters are supported in the folder name due to limitations with certain protocols.

Note: In order for the folders you create to become available from within your email client (e.g. Microsoft Outlook) you will need to create a mail account with IMAP set as your incoming mail server type. If you use POP mail, you only have access to your mail account Inbox, not any folders that are created for storing mail. IMAP accounts are different than POP because they are directly connected to the server from the time you open an interface until the time the connection is closed. For this reason, deleted messages are crossed out until they are "purged" from the folder. This is different from a POP account where when the messages are deleted, they are gone from the folder or erased.

Special Folders

Drafts - When you are composing a message, you have the option to "Save as Draft", which is located on the top of the New Message pop up screen. Choosing this option will save the email in this folder, but after a certain amount of time (which can be set by the user), it will automatically save to the Drafts folder. Later, you can click on the email in the drafts folder to edit or send it.

Deleted Items - You can set up your account to save deleted items in this folder from Settings. If you choose this option, ensure that you frequently clean out the messages in the folder to keep your disk space usage to a minimum.

Inbox - Incoming mail will usually come to this folder unless you have specific content filters that redirect the email to another folder. Users that connect to their email via POP3 will only be able to download messages from this folder.

Junk E-Mail - Email that is likely to be spam may get sent to this folder, depending on your spam filters. You should review this folder regularly to ensure that no valid email is contained in it, and "Unmark as spam" any message that gets put here when it should not.

Sent Items - Any emails you send from the webmail will get placed in this folder if you have enabled the option in Settings. Note that email sent from an email client, like Outlook Express, will not get saved in this folder.

Collaborate

Contacts

Contacts Overview

SmarterMail allows you to keep not only the email addresses of all of your important contacts, but all of their other information as well. All contact information, like all features of SmarterMail, is

accessible through the web interface from anywhere on the internet. Some features of Contacts in SmarterMail include:

- Contact lists can be imported to, and exported from, SmarterMail in multiple formats.
- Quick-add contacts to emails.
- Easy searching of contacts.
- Integration with Outlook (Enterprise Edition Only) .

To get started, click on the Collaborate button on the main toolbar, then select the Contacts control bar in the left pane.

Manage Contacts

The My Contacts page lists all of your contacts and lets you perform many actions, like searching or composing new email. View your contacts by clicking on My Contacts under the Contacts tree in the sidebar.

Edit a Contact - Click on the name of a contact to edit it.

Delete a Contact - To delete a contact, click on the delete link next to it, or check the contacts you want to delete and choose Delete Selected Contacts.

Search Contacts - Click on the Search button to begin searching for contacts. A second bar will appear that will allow you to search.

Sending an Email to a Contact - Click on the new message link next to a contact to send them an email, or choose multiple users and choose New Message to Selected Contacts from the Actions menu.

Export Contacts - For information about exporting contacts, refer to the KB article [How To - Export SmarterMail Contacts](#) .

Import Contacts - For information about importing contacts, refer to the KB article [How To - Import Contacts to SmarterMail](#) .

Integrating with Outlook (Enterprise Edition only) - If you have Enterprise Edition, you can use SmarterMail as a connector to Outlook so that your contacts in SmarterMail appear in Outlook and are automatically synchronized. For more information, please see [Synchronization Overview](#) .

Create a New Contact

There are two methods of adding a new contact:

- Click the Collaborate button on the main toolbar, then click the Contacts control bar, and finally click New Contact from the left tree view; or
- Click the Collaborate button on the main toolbar, then click the Contacts control bar, then click All Contacts from the My Contacts tree view, and finally click the New icon from the actions toolbar.

For ease of use, the contact page is separated into tabs that group related information. This information is outlined below.

Personal Info

- Display Name
- Title (Mr./Mrs./etc.)
- First Name
- Middle Name
- Last Name
- Suffix
- Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers
- Fax Numbers
- Address Information

Company Info

- Company Name
- Job Title
- Department
- Office
- Address Information
- Website

Categories

- Select which category or categories you would like to add this contact to
- To add a category simply click the Master Categories button and add comma(,) separated categories to the list

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 button in the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and click Account Profile in the left tree view.

Note: 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

Calendar allows you to store and retrieve appointment and meeting information from the same place as your email. SmarterMail's calendar system is very flexible and includes many options that can help you keep everything organized.

- 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 get started, click on Collaborate on the main toolbar, and then click the Calendar control bar in the left pane.

My Calendar

To get started working with your calendar, click the Collaborate button on the main toolbar, and then click on the Calendar control bar in the left pane. There are three primary views of calendars in

SmarterMail: Daily, Weekly, and Monthly. These views are very similar, but have a few differences, which are noted below.

- **Daily View** - The daily view is a planner-type view that shows all events during a day and also visually indicates when events overlap each other.
- **Weekly View** - This view is intended as more of an agenda-type view, showing all appointments that occur during a specific week.
- **Monthly View** - The monthly view shows a complete months' worth of appointments. It is meant more as an at-a-glance type of calendar that outlines a general idea of the upcoming events you have.

Calendar Controls

The right side of the page shows you both the current month and next month, and indicates days where events are scheduled with bold font in a different color. A legend below the calendars shows what different colors and effects mean.

Changing the month or year on the right calendar will not affect the calendar on the left. This is intended so you can look through a month (and the month after it) without affecting your currently selected timeframe.

Clicking on the double arrow next to the day indicators in the calendar will make the displayed month the currently selected month and put the calendar into the Monthly view.

Selecting the single arrow next to a week will select that week and change the display to the weekly view.

Clicking on a day in the calendar will make that day the selection and change to daily view.

Monthly, Weekly, and Daily View

The calendar view in the center of the page will change depending upon your date selection, as indicated above. These different views show data differently, but operate in the same manner.

- **Prev and Next** - Click these buttons to quickly select the next month, week, or day (depending on your current view mode).
- **Editing an Appointment** - Click on an appointment to edit its content.
- **Deleting an Appointment** - To delete an appointment, click on it, then click on the Delete button.
- **Sharing (Enterprise Edition Only)** - Sharing is a feature that is available only with Enterprise Edition of SmarterMail, and allows you to share your calendar with another user on your domain.

Create a New Appointment

There are two methods of adding a new appointment to a calendar:

- Click the Collaborate button on the main toolbar, then click the Calendar control bar in the left pane, and finally click New Appointment from the left tree view; or
- Click the Collaborate button on the main toolbar, then click the Calendar control bar, then select the calendar you want to view (Daily, Weekly, or Monthly), and finally click the Add Appointment icon from the actions toolbar.

For information about inviting attendees, please refer to the help topic [Inviting Attendees](#) .

Appointment

The Appointment tab records the common information about the appointment. The available settings are explained below.

- **Subject** - This is the short description of the appointment, and is what will appear on calendar pages and reminders.
- **Attendees** - Enter the email addresses of the people who you want to have attend this event. You can click on the attendees link to pop up a window that lets you quickly add members of your contact list or Global Address List. You can also check your attendees' availability by clicking on the Availability link to the right of the box. (Enterprise Edition Only). Once you save your appointment, the attendees will receive an email invitation to the event. If they accept, you will receive a notification back. Additionally, if they accept from within SmarterMail, the event will get added to their calendar as an appointment.
- **Location** - The physical location of the appointment. This field is optional.
- **Start Date and Time** - Enter the start date of the event. If the event will go all day, check the "All Day Event" box. You may click the calendar and/or the clock to the right of the box to help with this.
- **End Date and Time** - If the appointment does not have a scheduled end time, you may leave the end time blank.
- **Reminder** - This will allow you to choose if you want to be notified with an email, and at what time before the event starts. For more information about reminders, please see the help topic [Reminders](#) .
- **Email Notification** - Enter the email address that you would like notified of this appointment.

Note: Appointments will span multiple days and times if needed.

Recurrence Information

A recurring appointment is one that will happen again at some future date, and usually follows a pattern. A good example of a recurring event is a birthday. For more information about this, please refer to the help topic [Recurring Events](#) .

Description

Enter the full description of the appointment, if needed.

Categories

You may select which category the event should belong to or uncheck them all to specify an event with no category. To add a new category click on the Master Categories button to bring up the categories popup You may add categories by either using a comma(,) to separate them or putting one category per line.

Recurring events

SmarterMail's calendaring allows you to add events that recur over time. Recurring events can include:

- Personal Occasions (Birthdays, Anniversaries)
- Holidays
- Regular Meetings/Business Appointments
- Important Reminders (Seasonal Appointments)
- Much More

When adding an appointment, it can be converted to a recurring event by clicking on the Recurrence Information tab. Use the options on the tab to schedule how often an event recurs. Recurrence is very flexible, and can be as simple or as complex as you want. Examples include:

- A birthday that occurs every 7th of August.
- A meeting that happens the second Monday of every month.
- An appointment that occurs every 4 days for up to 3 weeks.

Reminders

Reminders may be added to appointments in calendaring by setting the reminder drop-down box to a value other than None in the Appointments tab when making a New Appointment. When a reminder is activated, a popup window will appear that reminds you of the event. At the bottom of the popup window you have the following options Snooze, Dismiss All, Dismiss, and Close the Window.

You can also choose to activate an email reminder to send an email when the reminder activates. This can be your own email address, or can optionally be an alternate email address, like a cell phone SMS or pager email address.

Tasks

Task List Overview

SmarterMail allows you to store all of your tasks in a single place, accessible from the web wherever you are. Tasks can be used to store to-do's or important checklists. Some features of SmarterMail tasks are:

- Configurable start and due times.
- Reminders that show up in SmarterMail to alert you of the task due date.
- Completion status that tracks the percent done of the task.

To get started, click the Collaborate button on the main toolbar, and then select the Task control bar in the left side bar.

Manage Tasks

The My Tasks page lists all of your tasks in one place and lets you sort and track them easily. To view your tasks, click the Collaborate button on the main toolbar, then click the Tasks control bar, and finally select All Tasks from the My Tasks tree view.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Task - Click on the subject of a task to edit it.
- Select the task you want to edit and click the Edit icon from the actions toolbar; or
- Right click the task you want to edit and select Edit from the drop down list; or
- Double-click the task you want to edit
- Deleting a Task - This can be accomplished two different ways:
 - Select the task you want to delete and click the Delete icon from the actions toolbar; or
 - Right click the task you want to delete and select Delete from the drop down list
- Searching Tasks - Click on the Search button to begin searching for tasks. A second bar will appear that will allow you to search.

Create a New Task

To add a task to your task list, either click on New Task in the tree view on the left hand side, or click the New icon on the actions toolbar

If you wish to add a task to a shared task list (Enterprise Edition Only) , you must be viewing the list, then use the New icon from within the page.

Details

- Subject - This is the short description of the task, and is what will appear on task pages and reminders.
- 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.
- Reminder - If you wish to have a reminder appear in SmarterMail, choose the amount of time beforehand that you want it to show.
- Priority - Higher priority tasks are more important. In My Tasks, you can sort by priority.
- Status - Choose the status of the task. This will show up in My Tasks so that you can easily track the status of your items.
- % Complete - This indicates the percentage that the task is completed.

Description

Enter the full description of the task, if needed.

Categories

You may assign one or more categories to each note to make for easier searching.

- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

Notes

Notes Overview

SmarterMail allows you to store all of your notes in a single place, accessible from the web wherever you are. Notes can be used to store to-do's or important checklists. Some features of SmarterMail notes are:

- Several colors to choose from
- The ability to assign a category to a note

To get started, click the Collaborate button on the main toolbar, and then select the Notes control bar in the left side bar.

Manage Notes

The My Notes page lists all of your notes in one place and lets you sort and track them easily. View your notes by clicking on My Notes under the Notes tree in the sidebar.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Note - This can be accomplished three different ways:
 - Select the note you want to edit and click the Edit icon from the actions toolbar; or
 - Right click the note you want to edit and select Edit from the drop down list; or
 - Double-click the note you want to edit
- Deleting a Note - This can be accomplished two different ways:
 - Select the note you want to delete and click the Delete icon from the actions toolbar; or
 - Right click the note you want to delete and select Delete from the drop down list
- To search your notes, click the Search icon on the action toolbar. This will open up a search toolbar below the actions toolbar which will allow you to search.

Create a New Note

To create a new note, either click on New Note in the tree view on the left hand side, or click the New icon on the actions toolbar.

- Color - Choose a color to make this note. You may wish to assign colors based on urgency or however you wish to color code.
- Note - The actual body of the note.
- Categories - You may assign one or more categories to each note to make for easier searching.
- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

Workspace

RSS Feeds

RSS Feed Overview

The SmarterMail web interface contains a sophisticated news feed aggregator. Use the RSS tree, by clicking on the Workspace button in the main toolbar. You can add feeds to keep an eye on. Some of the features of SmarterMail's RSS capabilities are:

- Supports RSS, RDF, Atom Feeds.
- Bolds the feed name to indicate that new articles are available for viewing.
- Downloads feeds in the background and shares feed information between users that connect to common feeds.

Editing an RSS Feed

This can be accomplished three different ways:

- Select the feed you would like to edit and click the Edit icon from the actions toolbar, or
- Right click the feed you would like to edit and select Edit from the drop down list, or
- Double-click the feed you would like to edit

Deleting an RSS Feed

This can be accomplished two different ways:

- Select the feed you would like to delete and click the Delete icon from the actions toolbar, or
- Right click the feed you would like to delete and select Delete from the drop down list

Subscribe to a New Feed

To get started with an RSS feed; click the Workspace button on the main toolbar, then select Root from the tree view. This will display a list of your RSS Feeds.

Click a specific RSS Feed in the Root folder to view the contents of that feed.

Subscribe to a New Feed

This can be accomplished two different ways:

- Click New Feed from the left tree view, or
- Click the New icon from the actions toolbar.

Adding a feed requires two pieces of information:

- Name - Enter a friendly name for the 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 feed URL must be entered exactly as it is written in the web site you want to track. Some sites do not offer RSS, and those that do usually have a link from their web site to the RSS feed. Some sample RSS feeds can be found in the help topic Sample Feeds .

Sample Feeds

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

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

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

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

Adding a Folder - A folder can be added a couple different ways. You can click the Plus Sign icon on the Folder toolbar; or move your mouse above a current folder, right-click, and choose New Folder . In both instances a new window will pop-up, allowing you to name your new folder.

Go To Folder - Click on a folder name to see the messages contained in the folder.

Rename a Folder - You can rename a folder by clicking on the folder you would like to rename and then clicking the Pencil icon on the Folder toolbar; or by moving your mouse over the folder that you would like to rename, right-click, and choose Edit . A new window will pop-up showing the current name of the folder, and a blank space will be available for a new folder name.

Delete a Folder - First choose the folder you would like to delete. Then either click the Trash Can icon on the folder toolbar; or right-click and choose Delete . A new window will pop-up asking you to confirm your deletion. At that point you may either continue with the delete, or cancel it.

Reports

Reports Overview

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.).

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

Report Options

You will see a calendar of the current month and five fields with drop down menus on the right side.

NOTE: Not all of the options below will be available for each report type.

Calendar - You can choose any amount of time you wish to base your report on—day, week, or month.

Rows - You can choose how many rows of usernames you would to have appear—10, 100, 500, 1000, 10,000

Sort - This allows you to choose how you want the different usernames sorted. Then you can select if you want it sorted in Ascending or Descending order.

Chart - This allows you to select which type of graph you want your data displayed in.

Value 1 - This gives you the option of which values you want to use in your graph—None, Total Disk, Junk Email, Deleted Items.

Value 2 - You can choose if you would like to add a second value to your graph.

Group - You can choose how you want the data displayed—Hourly, By Hour of Day, Daily, By Day of Week, Weekly, Monthly, By Month of Year, or Quarterly.

Once you have the data which you want shown in the report, click the Get Report button on the right side.

Across the action toolbar there are four icons—Add Favorite, Email, Export, and Print.

Add Favorite - This will allow you to add this report to your favorites list.

Email - This will allow you to send another person your report.

Export - This will allow you to export your report to a file.

Print - This will allow you to print your graph and chart.

Favorites

Report Favorites gives a user the ability to define certain criteria for reports that they will run on a regular basis. Once a chart is located that you would like to save, click the Add Favorites icon from the actions tool.

After clicking the Add Favorites icon, a window will pop up asking you to name your saved report and

to populate the chart fields. Chart Definitions Once all fields are completed to your satisfaction, click OK at the bottom of the pop up window.

To access one of your Favorites at anytime, click the report from under the Favorites in the left tree view.

Email Reports

SmarterMail gives you the opportunity to email yourself or others a specific report with any frequency (Daily, Weekly, Monthly) you choose. To get get started, click Scheduled Email Reports from the left tree view.

After clicking Scheduled Email Reports , click the New icon on the actions toolbar and you will be asked to populate the following fields:

Name - From the drop down list, choose the custom report you would like regularly emailed to you and/or others.

Frequency - From the drop down list, choose how often you would like the report emailed to you. (Daily, Weekly, Monthly)

To Address(es) - Enter the email addresses you would like the report sent to.

Cc Addresses(es) - Enter any additional email addresses that you would like to have receive a carbon copy.

Subject - Enter the subject for this email.

Message - Enter the message you would like associated with the email.

Email Format - From the drop down list, choose what format you would like the email sent (HTML + Plain text or Plain text only).

Enable Charts - Enable this to have charts associated with your report.

Custom Reports

The use of custom reports allows a user to accumulate data using very specific parameters. For example, a CEO of an organization may want to group related report items into one report to get an executive report of all their managers. To get started, click the Reports button on the main toolbar, then select Add Custom Report from the Custom Reports folder tree view.

Once you click on add custom report, you will be asked two things:

- Custom Report Name
- Default Date Range

Once you complete those two fields, click the Next icon from the actions toolbar.

Report Items

You will see four icons on the actions toolbar in this tab—Save, Add Item, Edit, and Delete.

Save - Clicking this icon will allow you to save your custom report as you go along.

Add Item - This allows you to add what parameters you would like your report to follow.

Report Item - Choose the report you would like to use from the drop down list.

Delete - This icon will let you delete a custom report.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

SpamAssassin Servers

This report shows general data regarding connections to external SpamAssassin servers. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Avg. Active Connections - This is the average number of active connections made by SmarterMail.
- Connections - This is the total number of connections made to a SpamAssassin server.
- Failed Connections - The total number of failed connections to a SpamAssassin server.

SMTP Out Connections

This report tells you the number of SMTP Out connections your server has made.

Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

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.

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.

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.

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.

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.

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.

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 report is broken up into two columns—Day and Viruses.

Security Reports

Abuse Detection

This report shows the number of attacks on the server. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- DOS Violations - The total number of DOS violations.
- Harvesting Violations - The total number of harvesting violations.
- Internal Spammer Violations - The total number of spam violations from users on the SmarterMail server.

Blacklist / Whitelist

This report shows the number of connections made from blacklisted and whitelisted IPs. Note: Not all reports are available for users and/or domains. Consult your system or domain administrator for report availability.

The following report items are available:

- Blacklisted Connections - The number of connections SmarterMail made to blacklisted IPs.
- Whitelisted Connections - The number of connections SmarterMail made to whitelisted IPs.

Settings

My Settings

Account Settings

To edit your personal settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and click Account Settings from the left tree view. The user settings will load in the content window 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 log in to SmarterMail.
- Password - The corresponding password used to log in to Smartermail.
- Display Name - The name displayed on outgoing messages.
- Reply-to Email Address - The XXX
- Time Zone - The time zone the used.
- Disable Greylisting - Select this option to disable greylisting.

Web Mail

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 - XXX.
 - 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.
 - Preview Pane - To specify the placement of the preview pane, select the appropriate option from the list.
 - 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 Sounds - Select this option to allow sound throughout SmarterMail.
- Enable Chart Animation - Select this option to enable animation for Silverlight charts.

Compose

Use this tab to specify the following settings for writing emails:

- Compose Format - To select the default format in which messages are created, select the appropriate option from the list.
- HTML - Use this option if you wish to add stylistic elements to your emails.
- Text - Use this for a simple method of email editing. You will not be able to change colors or fonts, but your emails will generally be much smaller and readable on more email clients.
- Compose Font - To specify the default font and font size for emails, select the appropriate option from the list.
- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list.
- Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list.
- Forwarding Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
- Normal - Includes original content, including font styles from original message, as part of the new message.
- Text - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links or fonts.

- **Embed as Attachment** - Attaches the original message to the new one. The message will not appear in the body of your message.
- **Auto Save Frequency** - To specify how frequently SmarterMail saves a draft of a message you are writing, select the appropriate option from the list.
- **Reply Header Type** - To specify the header type, select the appropriate option from the list.
Note: For most users, basic headers will be sufficient. Basic headers include From, To, and Subject headings whereas the full header includes MIME type filter restrictions, etc.
- **Reply Text Indicator** - The character appended to the beginning of each line of the original message in a message reply.
- **Enable inclusion of previous replies in reply** - Select this option to embed the text of the original message in a message reply.
- **Enable Sent Items Folder** - Select this option to save all outgoing messages in the Sent Items folder. Note: If you send many messages, you may need to delete items from this folder regularly.
- **Enable popup for new messages and replies** - Select this option to compose or reply to messages in a new popup window.
- **Disable closing of messages when replying** - Select this option to prevent SmarterMail from closing the original message when composing a reply.
- **Enable read receipts by default** - Select this option to create read receipts for all outgoing messages.
- **Enable trusted sender for Webmail recipients** - Select this option to add email addresses to which you have sent mail to your trusted senders list.

Forwarding Use this tab to set up SmarterMail to forward received messages to another email account.

- **Forwarding Address** - The email address to which messages will be forwarded.
- **Enable deletion of message on forward** - Select this option to automatically delete messages from your SmarterMail inbox after they are forwarded.

Plus Addressing

Plus Addressing is a feature of SmarterMail that allows you to automatically filter your incoming email without creating content filtering rules first. For more information, see [Plus Addressing](#) .

- **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 - Check this box to enable plus addressing.

Account Profile

Your profile is your public contact information to others in your domain when they access the Global Address List through the web mail or through LDAP. Note: LDAP only supported in Enterprise Edition.

For ease of use, your profile has been separated into tabs that group related information. This information is outlined below.

To get started, click the Settings button on the main toolbar, and then select Account Profile under the My Settings tree view.

Personal Info

- Display Name
- Title (Mr./Mrs./etc.)
- First Name
- Middle Name
- Last Name
- Other Email Address
- Instant Messenger
- Home Page
- Date of Birth
- Additional Info

Contact Info

- Phone Numbers
- Fax Numbers
- Address
- City
- State
- Postal Code
- Country

Company Info

- Company Name
- Job Title
- Department
- Office
- Address
- City
- State
- Postal Code
- Country
- Website

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

The Notification Profiles page lists all of your profiles and lets you perform many actions, like adding a new profile, edit, delete, or search.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the

drop down menu, or

- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

Auto Responder

The auto-responder is an automated message that will be sent as a reply to all incoming email messages. Many people use auto-responders as vacation messages or confirmations of receipt of the message.

To get started, click the Settings button on the main toolbar, and then select Auto-Responder under the My Settings tree view.

Options

Enable Auto-Responder - This check-box allows you to quickly turn the auto-responder on or off. If the auto-responder is disabled, the Auto-Responder Message tab will not be enabled.

Disable responses to indirect mail - By checking this box, only mail sent directly to you will receive your auto-responder. Any mail you receive through a mailing list, forward, or an alias will not trigger your auto-responder.

Limit responses to one per day per sender - This will ensure that an email address only receives your auto-responder 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

Note: This tab will only be enabled if the auto-responder is enabled.

Subject - Enter a subject for your auto-responder (e.g. Vacation).

HTML or Plain Text - Determine whether you want to compose your auto-responder in plain text or HTML.

Body - Enter a body, or text that you would like to include in the automatic response, for example:

- "I am on vacation in Hawaii, and will not have access to a computer until Monday."

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 button in the main toolbar and then click the Settings navigation pane. Then expand the My Settings folder and click Trusted Senders in the left tree view. When adding a new trusted sender to the list, make sure to type only one email address or domain per line.

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 button in the main toolbar and then click the Settings navigation pane. Then expand the My Settings folder and click Signatures in the left tree view. 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 actions toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the actions toolbar.

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 Settings in the main toolbar and then click the Settings navigation pane. Expand the My Settings folder and click Message Retrieval in the left tree view.

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.

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 Settings in the main toolbar and then click the Settings navigation pane. Expand the My Settings folder and click SMTP Accounts in the left tree view.

When creating a new SMTP account, the following options are available:

- Server Address - The address for the external email server for which you want to connect.
- Port - The port used to connect to the email server. By default, the port is 25.
- Display Name - The name that appears in the From field of emails.
- Email Address - The email address that corresponds to the external email server.
- Username - The identifier used to authenticate with the external email server.
- Password - The corresponding password used to authenticate with the external email server.
- Encryption - The type of encryption required by the external email server.
- Enable Authentication - Select this option if SMTP authentication is required to send mail from this email address.

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 check your possible options, click the Settings button on the main toolbar, then select Folder Auto-Clean from the Filtering folders tree view.

Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

Note: If auto-clean is active on a folder, messages will get deleted from it eventually, so do not keep messages in that folder if you want to keep them.

Options

Use default auto-clean settings - Choosing this option will let you adopt the policy of your email host or domain administrator. If the administrator changes the policy, yours will automatically change with it. You can see the current policy on the Folders tab when this option is active.

Override auto-clean settings for this account - Choose 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.

Inbox auto-clean - Users can use the auto-clean feature, if permitted by the System Administrator.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, they will appear on this tab. In cases where you are able to override the settings, you have the option of auto-cleaning folders based upon size or date.

These options will be visible if size is chosen:

- Folder size BEFORE auto-clean - Once the folder reaches this size (in megabytes), the auto-clean process is started, and older messages (messages that were received the longest time ago) are cleaned.
- Folder size AFTER auto-clean - This is the goal size for the auto-clean process. It will try to delete older messages until the folder gets to this size. This number should always be lower than the "before" number.
- Enable auto-clean for this folder - If this box is checked, then auto-clean will be active for the specified folder.

These options will be visible if date is chosen:

- Mail Age - Enter the maximum number of days mail will stay in the current folder. Once a message reaches that age, it will be deleted.
- Enable auto-clean for this folder - If this box is checked, then auto-clean will be active for the specified 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 emails from a specific email address to another account, or even alter the subject of specific types of email. Content filtering is very open ended, in order to allow you to filter the way you want to.

To get started, click the Settings button on the main toolbar, and then select Content Filtering in the Filtering folder under the My Settings tree view.

Adding a Filter - Clicking the New Filter icon on the Action toolbar starts the Content Filter Wizard which is explained in more detail below.

Editing a Filter - Click on a filter's row then click the Edit icon in the Action tool bar, or right click and select Edit .

Deleting a Filter - Click on a filter's row then click the Delete icon in the Action tool bar, or right click and select Delete .

Deleting all Filters - Clicking the Delete All button will delete all content filters for your account. Once you confirm the action, it is not reversible.

Changing Filter Order - 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 advanced 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 button on the main toolbar and click the Settings navigation pane. Then expand the My Settings and Filtering folders and click Spam Filtering in the left tree view.

Options

Use default spam settings - Choose this option to accept the default spam options provided by your domain administrator. The settings will be displayed in the Actions tab for easy reference.

Override spam settings for this account - Select this option to customize the way spam is handled, and to override the settings created by the domain administrator. More information about the types of actions allowed can be found below.

Actions

If you are using the default spam options that were set up by your administrator, they will appear on this tab.

In the case that you have chosen to override the settings, the following possible actions appear for each spam probability.

- No action
- Delete message
- Move to Junk E-Mail folder
- Add text to subject line - A Text box will appear where you can specify the text you would like appended to the subject.

Sharing

Shared Objects Overview

This feature is only available in SmarterMail Enterprise edition.

SmarterMail allows you to share resources like calendars with other users of your domain. The types of items that can be shared include:

- E-Mail Folders
- Contacts
- Calendars

- Task Lists
- Notes

Items that you are sharing with others are called Shared Resources. Items you are connected to on others' accounts are called Mapped Resources.

Shared Resources

This feature is only available in SmarterMail Enterprise edition.

Sharing a resource, such as a calendar or e-mail folder, will allow the users you specify to access the resource with a pre-determined permission level.

To share a resource (in this example your calendar), follow the steps below:

- To get started, click the Settings button on the main toolbar, and then select Shared Resources in the Sharing folder under the My Settings tree view.
- Click on the New icon in the Actions toolbar.
- Select who you would like to Share with
 - User - A user is a single person on your domain.
 - Group - A group is a set of users that fall under a similar department, permission level, or role. Your domain administrator can add and modify these user groups.
- Choose an access level:
 - None - This resource is not shared with the user. This setting is useful if you give permissions to a group but want a specific user to be denied permission.
 - Availability-Only (Calendars only) - This setting is used to show availability for you if the user clicks on the availability link when adding a calendar item. Other than this functionality, the calendar acts as if it is not shared.
 - Read-Only - Grants view access to the resource, which lets the other user see your information, without granting any permission to change or modify the resource in any way.
 - Full Control - The user that has this permission can do everything on the resource that you can, including moving items, changing things, and even deleting information.
- Save the user or group and repeat the process as needed. More than one user can be added at a time by putting each username on a separate line.

Note: The steps are very similar for each of the resource types. Just make sure you are viewing the resource you want to share when you click on the Sharing button.

Mapped Resources

This feature is only available in SmarterMail Enterprise edition.

SmarterMail allows you to connect to resources (calendars, e-mail folders, etc) that have been shared to you by other users on your domain. To connect to a shared resource, perform the following steps:

- To get started, click the Settings button on the main toolbar, and then select Mapped Resources in the Sharing folder under the My Settings tree view.
- You will be presented with a list of all currently attached resources.
- You can search for resources by name, or find one in the list and click on the Attach button.
- Enter a friendly name for the resource and click the Save icon.

The resource will now be available in the sidebar.

If you wish to detach from a resource, go into Open Shared Resources and click on the Detach link next to the item.

Events

Overview

The Events system allows you to act on Events that occur throughout the system. SmarterMail's Event System is intended to allow an infinite number of unique customizations using notification profiles and the reminders system.

It is recommended that you create/update your Notification Profile prior to creating an Event.

Manage Events

The All Events page lists all of your scheduled events and lets you perform many actions, including: editing, deleting, searching, or adding a new event.

View your Events by clicking on All Events under My Events from the tree view in the sidebar.

Adding an Event - To add a new event, either select Attach Event from the tree view, or click the New icon from the actions toolbar.

Edit an Event - Editing an event can be done in three different ways:

- Select the event that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the event you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the event that you would like to edit

Deleting an Event - Deleting an event can be done two different ways:

- Select the event that you would like to delete and then click the Delete icon from the actions toolbar, or
- Move your mouse over the event you want to delete and right-click, then select Delete from the drop down menu.

Searching an Event - To search your events, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions tool bar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, Event Category, Event Type, Conditions, or Actions.

Create a New Event

To add a new event, select New Event from the left tree view.

The event page is split into two tabs for easy use—Options and Actions.

Options Tab

Name - Allows you to assign a specific name to your event.

Event Group - Allows you to select a folder in which to store/associate your event subscriptions.

- To add a new Event Group, click the Plus Sign icon on the folders toolbar.
- To edit an Event Group, select the Event Group you wish to Edit and then click the Pencil icon on the folders toolbar.

Event Category - Select the trigger category for your notification. For more information about specific event categories, select a category for the Event Categories folder.

Event Type - This is a specific trigger relating to the Event Category.

Based upon the Event Category and Event Type that was chosen, different parameters will be available for you to choose to help set up your event.

Actions Tab

When clicking the Actions tab the screen will be blank. To add a new event, click the Add Action icon from the actions toolbar.

Action - This defines how the system will alert you.

Max Frequency - This allows you to set how often you want to be notified.

Notification Profile - This allows you to choose which profile you want to use.

From Address - This is the email address from which the email will be sent from.

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

Once all fields are complete, click the Save icon from the actions toolbar to save that event.

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

The Notification Profiles page lists all of your profiles and lets you perform many actions, like adding a new profile, edit, delete, or search.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or

- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

Event Categories

Aliases

Alias Added

Users of SmarterMail can set up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has added a new alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

Alias Deleted

Users of SmarterMail can set up aliases for their mail to be sent to. Administrators can utilize the attributes listed below to alert them when a user has deleted an existing alias.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Alias Name - Enter an alias name to trigger this event.

Alias Addresses - Enter an alias address to trigger this event.

Collaboration

Calendar Reminder Occured

SmarterMail gives users the ability to set up reminders to alert them of upcoming appointments within their calendar. Users of SmarterMail can utilize the attributes listed below to alert them of when a reminder has occurred.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Location - Enter a meeting location to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

Task Reminder Occurred

SmarterMail gives users the ability to set up reminders to alert them of upcoming deadlines for particular tasks. Users of SmarterMail can utilize the attributes listed below to alert them when a reminder for a task has occurred.

Attributes

Time of Day - Enter a time of day to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Description - Enter a meeting or task description to trigger this event.

Priority - Enter the priority level to trigger this event.

Percent Complete - Enter the percent complete of a task to trigger this event.

Status - Enter the status of a task to trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

Domain

Domain Added

Administrators may want to monitor when domains have been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new domain has been added to the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used - Enter the number of domains that will trigger this event.

Domains User (%) - a percentage of the total number of domains allowed to trigger this event.

Domain Deleted

Administrators may want to monitor when a domain has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a domain has been deleted from the server.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Domains Used -

Domains User (%) -

Domain Disk Space Used

The amount of disk space a domain uses is very important for administrators to monitor. Administrators can utilize the attributes listed below to be notified when a domain reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain Usage (%) - Enter the percentage of disk space used to trigger this event.

Domain Usage (MB) - Enter the disk space used in MB to trigger this event.

Domain - Enter a domain to trigger this event.

Email

Email Message Received

Users can utilize the attributes listed below to be notified when they receive a message within SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is received from within the domain.

Spam Level - Select the spam level you want to have trigger this event.

Email Message Sent

Users can utilize the attributes listed below to be notified when a message is sent from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

To Domain - Enter the domain that an email is sent to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

From Domain - Enter the domain that an email was sent from to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Size (KB) - Enter the size of the message in KB to trigger this event.

Intra Domain - Check this to have the event triggered if an email is sent within the domain.

Mailing Lists

Mailing List Added

Mailing lists can be very time consuming and can slow down the efficiency of a server when being sent. Administrators can utilize the attributes listed below to alert them when a new mailing list has been added to the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

Mailing List Deleted

Administrators can utilize the attributes listed below to alert them when a mailing list has been deleted from the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

Message Sent to Mailing List

Administrators can utilize the attributes listed below to be notified when a message has been sent to a mailing list.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

List Name - Enter the name of a mailing list to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

Security

Abuse Detection Rule Triggered

The monitoring of Security for an administrators system and/or domain is very important.

Administrators would and need to know if a domain or user has abused any rule that has been put in place. Administrators can utilize the attributes listed below to be notified when a rule has been abused.

Attributes

Time of Day - Enter a time of day to trigger this event.

Rule Type - Select the security rule that you want to trigger this event.

IP Address - Enter an IP address that will trigger this event.

Rule Name - Enter a name for the rule to trigger this event.

ClamAV Failure

ClamAV is a 3rd party source integrated with SmarterMail to help detect and prevent viruses from entering the system. Administrators can utilize the attributes listed below to notify them when there has been a failure with the ClamAV service.

Attributes

Time of Day - Enter a time of day to trigger this event.

ClamAV IP - Enter the IP address of the ClamAV server that will trigger this event.

ClamAV Port - Enter the port of the ClamAV server that will trigger this event.

Consecutive Failures - Enter the number of failures that needs to be reached to trigger this event.

File Name - Enter the name of the file to trigger this event.

File Size (KB) - Enter the size of the file in KB that will trigger this event.

Outgoing Message Blocked

Administrators may want to know if outgoing messages are being blocked so they can further investigate why and from whom the message was sent. Administrators can utilize the attributes listed below to be notified when an outgoing message was blocked.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Spam Weight - Enter the spam weight of the message that will trigger this event.

File Name - Enter the name of the file to trigger this event.

Virus Found

Viruses can be very harmful to SmarterMail or the entire system. Administrators can utilize the attributes listed below and be notified if a virus gets through the ClamAV service and is found.

Attributes

Time of Day - Enter a time of day to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

To Address - Enter the email address that an email is sent to trigger this event.

Subject - Enter a task or email subject to trigger this event.

Virus Name - Enter the name of a virus that will trigger this event.

File Name - Enter the name of the file to trigger this event.

System

Gateway Failure

Administrators can utilize the attributes listed below to be notified when a gateway server has failed so they can correct the problem as soon as possible.

Attributes

Time of Day - Enter a time of day to trigger this event.

Gateway Address - Enter the address of the gateway that will trigger this event.

License Expiration

Administrators may be using a trial license to experiment with a new product and will want to know when it expires. Administrators can utilize the attributes listed below to be notified when the license is close to expiration.

Attributes

Time of Day - Enter a time of day to trigger this event.

Days Left - Enter the number of remaining days that will trigger this event.

Memory

Memory is very important for a mail server to maintain the best efficiency possible and domains and users may be set at a certain maximum. Administrators can utilize the attributes listed below to be notified when the domain or user reaches a certain memory level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Memory Used (%) - Enter the percentage of memory used that will trigger this event.

Memory Used (MB) - Enter the amount of memory used in MB that will trigger this event.

New Version Available

Administrators can utilize the attributes listed below to be notified when a new version has been made available.

Attributes

Time of Day - Enter a time of day to trigger this event.

Version - Enter version that will trigger this event.

Service Started

Administrators may want to know if and when a new service has been started. Administrators can utilize the attributes listed below to be notified when a new service has been started.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

Service Stopped

Administrators may want to know when a service has been stopped. Administrators can utilize the attributes listed below to be notified when a service has been stopped.

Attributes

Time of Day - Enter a time of day to trigger this event.

Service - Select the service that will trigger this event.

Spool Count

The number of messages within the spool can be very important when the number reaches a certain level which could mean a problem within the system. Administrators can utilize the attributes listed below to be notified when the spool count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Spool Count - Enter the number of messages in the spool that will trigger this event.

System Settings Changed

Administrators can utilize the attributes listed below to be notified when any settings have been changed within the system.

Attributes

Time of Day - Enter a time of day to trigger this event.

System Uptime

Administrators may want to monitor the total amount of time the system has been running and can utilize the attributes listed below to notify them when it reaches a certain point.

Attributes

Time of Day - Enter a time of day to trigger this event.

Uptime (Days) - Enter the number of days the system has been running that will trigger this event.

Threads

Administrators will want to monitor concurrently running threads to ensure the system to be running at the maximum efficiency. Administrators can utilize the attributes listed below to be notified when the thread count reaches a certain level.

Attributes

Time of Day - Enter a time of day to trigger this event.

Thread Count - Enter the number of threads that will trigger this event.

Throttling

Domain Throttled

Administrators can put a throttling threshold on a particular domain within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a domain reaches the throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

User Throttled

Administrators can put a throttling threshold on a particular user within SmarterMail so that their IP address will not be blacklisted. Administrators can utilize the attributes listed below to be notified when a user reaches that throttling threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

From Address - Enter the email address that an email was sent from to trigger this event.

User

User Added

Administrators may want to monitor when a new user has been added to SmarterMail. Administrators can utilize the attributes listed below to alert them when a new user has been added to SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

User Deleted

Administrators may want to monitor when a user has been deleted from SmarterMail. Administrators can utilize the attributes listed below to alert them when a user has been deleted from SmarterMail.

Attributes

Time of Day - Enter a time of day to trigger this event.

Domain - Enter a domain to trigger this event.

Username - Enter the username that will trigger this event.

Full Name - Enter the full name of a person that will trigger this event.

User Disk Space Used

The amount of disk space a user utilizes is very important for administrators to monitor, because domains may only be given a certain amount of disk space to use. Administrators and users can utilize the attributes listed below to be notified when a particular user reaches a certain threshold.

Attributes

Time of Day - Enter a time of day to trigger this event.

Mailbox Usage (%) - Enter the percentage of the mailbox used that will trigger this event.

Mailbox Usage (MB) - Enter the size in MB of the mailbox used that will trigger this event.

Domain - Enter a domain to trigger this event.

Email Address - Enter an email address to trigger this event.

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](#).

Synchronization

Synchronization Overview

This feature is only available in SmarterMail Enterprise edition.

SmarterMail 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.
- SmarterMail Sync is a desktop utility that syncs SmarterMail mailboxes with Outlook and Windows Mobile devices.
- SyncML is a platform-independent information synchronization standard that syncs SmarterMail mailboxes with Outlook, Thunderbird, and most smartphones.

In addition, the Add to Outlook button in the SmarterMail Webmail interface uses two-way synchronization technology to sync a SmarterMail mailbox with Outlook.

For more information regarding the different synchronization methods available for SmarterMail 6.x, please refer to the [Collaboration, Synchronization, and Over-the-Air Mobile Communications with SmarterMail](#) document on the Help and Documentation page of the SmarterTools website.

SmarterMail Sync

This feature is only available in SmarterMail Enterprise edition.

SmarterMail Sync is a desktop utility developed by SmarterTools that allows you to quickly and easily synchronize your calendars, contacts, tasks, and notes with Microsoft Outlook and Windows Mobile devices.

SmarterMail Sync uses port 80 (HTTP) to connect to your SmarterMail server, then uses internal

methods to synchronize your data with Outlook and Windows Mobile devices. In most cases, this process is completely automatic. If a conflict occurs, you will be asked how to handle the conflict.

Installing SmarterMail Sync

The latest versions of SmarterMail Sync is available from within the SmarterMail interface. To view the available versions of SmarterMail Sync, log in to your SmarterMail account and click Settings in the main toolbar. Then click the Settings navigation pane and click SmarterMail Client Utilities in the left tree view. Download and install the appropriate version(s) of the utility.

In general, the Outlook connector of SmarterMail Sync will add about 10 MB of memory usage to what Outlook uses on your computer without SmarterMail Sync.

Microsoft Outlook Synchronization

Before you can synchronize any SmarterMail mailboxes with Outlook using SmarterMail Sync, you will need to configure your account for synchronization. For more information, please refer to the KB article [How To - Configure SmarterMail Accounts for Synchronization Using SmarterMail Sync](#).

For step-by-step instructions on synchronizing accounts using SmarterMail Sync, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Outlook Using SmarterMail Sync](#). In the course of synchronizing accounts, conflicts may occur. For example, if you update a contact in Outlook and in SmarterMail, the changes may conflict with one another. In this case, SmarterMail Sync will ask you how the conflict should be handled.

SyncML

This feature is only available in SmarterMail Enterprise edition.

SyncML (Synchronization Markup Language), also referred to as Open Mobile Alliance Data Synchronization (OMA DS), is a platform-independent open standard for synchronization of information. It is most commonly used to synchronize and/or back up contacts and calendars between mobile phones and a network-based service or computer.

SmarterMail uses the Funambol SyncML plug-in for synchronizing calendars, contacts, tasks, and notes with Microsoft Outlook, Mozilla Thunderbird, and most smartphones.

Microsoft Outlook and Mobile Synchronization

Before you can synchronize any SmarterMail mailboxes with Outlook using SyncML, you will need to configure your account for synchronization. For more information, please refer to the KB article [How To - Configure SmarterMail Accounts for Synchronization Using SyncML](#).

For step-by-step instructions on synchronizing accounts with Microsoft Outlook using SyncML, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Outlook Using SyncML](#).

For step-by-step instructions on synchronizing accounts with smartphones using SyncML, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Mobile Devices Using SyncML](#).

Microsoft Exchange ActiveSync

This feature is only available in SmarterMail Enterprise edition.

Microsoft Exchange ActiveSync is a data synchronization protocol that enables over-the-air access to email, calendars, tasks, and notes from most mobile devices, including Blackberry, iPhone, Palm Pre, and Windows Mobile devices. In addition, Exchange ActiveSync enables SmarterMail users to have access their email, calendars, tasks, and notes while working offline.

Exchange ActiveSync is available as an optional add-on from SmarterTools and is associated to a single SmarterMail license key at the time of purchase. For more information, please refer to the SmarterMail Add-ons tab on the SmarterTools website.

Configuring Exchange ActiveSync

Once the Exchange ActiveSync add-on has been purchased, the system administrator will need to reactivate SmarterMail. For step-by-step instructions, please refer to the KB article [How To - Activate Microsoft Exchange ActiveSync](#). Then the system administrator will need to enable Exchange ActiveSync for your mailbox. For more information, please refer to the KB article [How To - Configure Microsoft Exchange ActiveSync for Email Accounts](#).

Mobile Synchronization

For step-by-step instructions on synchronizing a SmarterMail mailbox using Exchange ActiveSync, please refer to the KB article [How To - Synchronize SmarterMail Accounts with Mobile Devices using Exchange ActiveSync](#).

Help for Domain Administrators

Email

Email Overview

SmarterMail has many features that allow you to easily access and manage emails. For more information, see the Email Overview in the Email folder of the Help for Users section of the online help.

Message Archive Search

This feature is only available in SmarterMail Enterprise edition.

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

To search the archive, click the Manage button in the main toolbar and click Message Archive Search in the left tree view. 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 the Email button in the main toolbar and clicking Message Archive Search in the left tree view.

For more information on archiving, see Message Archiving .

Collaborate

Collaborate Overview

SmarterMail includes many popular collaboration tools, including contacts, calendars, tasks, and notes. For more information, see the Collaboration folder of the Help for Users section of the online help.

Workspace

Workspace Overview

SmarterMail makes it easy to read and manage news feeds with the Workspace. For more information, see the Workspace folder of the Help for Users section of the online help.

Reports

Reports Overview

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

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

Settings

My Settings

To edit your personal settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the My Settings folder and choose the appropriate settings page. For more information, see the My Settings folder of the Help for Users section of the online help.

Domain Settings

General Settings

Domain administrators will use this section to adjust any general domain settings. To access this section, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Domain Settings folder and click General Settings from the left tree view. 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:

- Web Mail 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 enable XXX
- 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

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

To view a list of users on a domain, click the Settings button and click the Settings navigation pane. Then expand the Domain Settings folder and click Users in the left tree view. 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 actions 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 log in to SmarterMail.
- Authentication Mode - The authentication method used to log in to SmarterMail.
- Password - The corresponding password used to log in to Smartermail.
- Display Name - The name displayed on outgoing messages.
- Reply-to Email Address - The XXX
- 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 Password Changes - Select this option to prevent XXX.
- 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.
- Disable Greylisting - Select this option to disable greylisting.
- Enable Outgoing Mail Signing - Select this option to enable mail signing for outgoing messages.

Web Mail

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 - XXX.
- 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.
- Preview Pane - To specify the placement of the preview pane, select the appropriate option from the list.
- 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 Sounds - Select this option to allow sound throughout SmarterMail.
- Enable Chart Animation - Select this option to enable animation for Silverlight charts.

Compose

Use this tab to specify the following settings for writing emails:

- Compose Format - To select the default format in which messages are created, select the appropriate option from the list.
- HTML - Use this option if you wish to add stylistic elements to your emails.
- Text - Use this for a simple method of email editing. You will not be able to change colors or fonts, but your emails will generally be much smaller and readable on more email clients.
- Compose Font - To specify the default font and font size for emails, select the appropriate option from the list.
- Text Encoding - To specify the character set used in messages composed through the Web interface, select the appropriate option from the list.
- Spell Check Dictionary - To specify the default dictionary to use for spell-checking emails, select the appropriate option from the list.
- Forwarding Method - To specify the method by which messages are forwarded, select the appropriate option from the list.
- Normal - Includes original content, including font styles from original message, as part of the new message.
- Text - Inserts the plain text version of the original message into the new message. This is useful if you want to exclude links or fonts.
- Embed as Attachment - Attaches the original message to the new one. The message will not appear in the body of your message.
- Auto Save Frequency - To specify how frequently SmarterMail saves a draft of a message you are writing, select the appropriate option from the list.
- Reply Header Type - To specify the header type, select the appropriate option from the list. Note: For most users, basic headers will be sufficient. Basic headers include From, To, and Subject headings whereas the full header includes MIME type filter restrictions, etc.
- Reply Text Indicator - The character appended to the beginning of each line of the original message in a message reply.

- Enable inclusion of previous replies in reply - Select this option to embed the text of the original message in a message reply.
- Enable Sent Items Folder - Select this option to save all outgoing messages in the Sent Items folder. Note: If you send many messages, you may need to delete items from this folder regularly.
- Enable popup for new messages and replies - Select this option to compose or reply to messages in a new popup window.
- 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. For more information, see [Plus Addressing](#) .

- 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 - Check this box to enable plus addressing.

Service Access

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

- Enable POP Access - Select this option to allow the user to download mail using POP3.
- Enable IMAP Access - Select this option to allow the user to download mail using IMAP.
- Enable Incoming SMTP Access - Select this option to allow users to receive email from external domains.
- Enable Outgoing SMTP Access - Select this option to allow users to send email to external domains.
- Enable Web Mail Access - Select this option to allow users to log in to SmarterMail from the Webmail interface.

Email Aliases

A user alias represents a forward to an actual email account. The sole purpose of a user alias is to forward email to other accounts. Aliases may not send mail, and may not log into the web mail.

Managing Aliases

As a domain administrator, you can manage email aliases from the Email Aliases page in the Settings menu.

Add Alias - Click the New icon on the actions toolbar to begin the process of adding a new alias. More information about adding aliases can be found in the topic [Adding a User Alias](#) .

Edit an Alias - Edit an alias by clicking on the name of the alias in the table and selecting the Edit icon

from the actions toolbar, or right-click over a selected alias and select Edit , or double click the name of the alias.

Deleting an Alias - To delete an alias, select the alias you would like to delete and then either click the Delete icon from the actions toolbar, or right-click above the alias and select Delete .

Domain Content Filtering

Domain content filtering allows you to create the same types of content filters as you can in Content Filtering, 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, please refer to the topic 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 filter only items that affect the entire domain.

Spam Filtering

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 button on the main toolbar and click the Settings navigation pane. Then expand the Domain Settings folder and click Spam Filtering in the left tree view.

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.

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.

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 button in the main toolbar and then click the Settings navigation pane. Then expand the Domain Settings folder and click Signatures in the left tree view. 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 actions toolbar and complete the appropriate fields. To edit an existing signature, select the desired signature and click Edit in the actions toolbar.

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or
- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar.

Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

[Mailing Lists](#)

Mailing Lists

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 in the main toolbar and click the Settings navigation pane. Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the left tree view. 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 actions 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, click Email in the main toolbar and click New Mailing List Message in the left tree view. This will load a new message window, which you can use to compose the new mailing list message.

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

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

List Settings

Use this tab to edit the following mailing list settings:

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

recommends using a subject prefix for discussion lists to help subscribers easily through filter posts.

- Enabled - Check this box to enable the subject prefix for this mailing list.
- Max Message Size - The maximum number of KBs a message can be. If the message exceeds this size, it will not be posted. By default, the max message size is unlimited.
- Disable Mailing List - Check this box to disable the mailing list.
- Description - A brief summary of the mailing list.

Options

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

- Enable Digest Mode - Select this option to enable digest mode. For more information, see the Digest Settings tab.
- Enable Replies to List - Select this option to allow subscribers to send replies to the entire mailing list. If this option is disabled, the reply will be sent to the person who posted the original message on the list.
- Enable Header - Select this option to append header text to the beginning of the mailing list message. Note: To edit the header text, click the System Messages tab and edit the appropriate system message.
- Enable Footer - Select this option to append footer text to the end of the mailing list message. Note: To edit the footer text, click the System Messages tab and edit the appropriate system message.
- Send Subscribe Email - Select this option to automatically send an email to new subscribers.
- Send Unsubscribe Email - Select this option to automatically send an email response to unsubscribe requests.
- Enable Poster Whitelist - Select this option to allow whitelisted email addresses to post to the mailing list.
- Enable SUBSCRIBE Command - Select this option to allow people to subscribe to the mailing list by emailing a listserv command to the command address. For more information, refer to Listserv Commands . Note: If this option is disabled, only list administrators can add new subscribers to the mailing list.
- Enable LIST Command - Select this option to allow people to receive a list of the mailing list subscribers by emailing a listerv command to the command address. For more information, refer to Listserv Commands . Note: It is recommended that you leave this option disabled, as people or automated systems could use the user list for malicious purposes.
- Enable Unsubscribe from Subject - Select this option to allow subscribers to unsubscribe from the mailing list by sending an email to the list with the word "unsubscribe" in the subject line. It

is recommended that you usually keep this option enabled, as it will reduce complaints of abuse by giving subscribers a way to quickly opt-out of the mailing list.

- Enable Double Opt In - Select this option to automatically send an email confirmation to new subscribers.
- Disable List Error Replies - Select this option to prevent the system from automatically replying to incorrect listserv commands.

Digest Settings

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

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

System Messages

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

Throttling

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

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

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

Subscribers

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 in the main toolbar and click the Settings navigation pane. Then expand the Domain Settings and Mailing Lists folders and click Subscribers in the left tree view. 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 actions toolbar:

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

For step-by-step instructions on adding subscribers to a mailing list, please refer to the KB article [How To - Add Subscribers to Mailing Lists](#). To edit an existing subscriber's details, select the desired subscriber from the list and click Edit in the actions 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 button in the main toolbar and then click the Settings navigation pane. Then expand the Domain Settings and Mailing Lists folders and click Mailing Lists in the left tree view. Select the desired mailing list and click Edit. Then click Subscribers in the actions toolbar and click Digest Subscribers .

Subscriber Fields

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

Templates

Domain administrators can create custom templates to send emails to the mailing list. For example, an organization can build a newsletter template complete with graphics and company information that the marketing department can use to send quarterly newsletters to internal and external customers. Product managers can also create a product update template to keep subscribers updated on the latest information on specific products.

To view the mailing list templates for your domain, click the Settings button in the main toolbar and then click the Settings navigation pane. Then expand the Domain Settings and Mailing Lists folders and click Templates in the left tree view. A list of templates will load in the content pane.

To create a new template, click New in the actions toolbar. To edit an existing template, select the desired template and click Edit in the actions toolbar.

To create a new mailing list message using a template, click the Email button in the main toolbar and click New Mailing List Message in the left tree view. This will open a new mailing list message window that you can use to compose an email to the mailing list. To load a template into the new message, select the appropriate template from the Template field.

Advanced Settings

Domain Aliases

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.

To get started, click the Settings button on the main toolbar, and then select Domain Aliases under the Filtering folder in the Domain Settings tree view.

Notes:

- Messages cannot be retrieved with a domain alias email address unless the domain is properly registered at a domain registrar.
- The mail exchange (MX) record for the domain being added must already be pointing at the server prior to this process. This 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

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 button in the main toolbar and click the Settings navigation pane. Then expand the Domain Settings and Advanced Settings folders and click Mail Signing in the left tree view.

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.

Domain Folder Auto-Clean

Domain 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 domain accounts do not fill up unnecessarily. Oldest messages will be deleted from the folders first. If you override the auto-clean settings, the settings you choose will trickle down to your users.

To get started, click the Settings button on the main toolbar, and then select Folder Auto Clean under the Filtering folder in the My Settings tree view .

Note: Depending on the policies your administrator has established, you may or may not be able to change the settings on this page.

Note: If auto-clean is active on a folder, messages will get deleted from it eventually, so do not keep messages in that folder if you want to keep them.

Options

Use default auto-clean settings - Choosing this option will let you adopt the policy of your system administrator. If the administrator changes the policy, yours will automatically change with it. You can see the current policy on the Folders tab when this option is active.

Override auto-clean settings for this account - Choose this option to override the settings. Any changes you make will not be affected if the administrator changes the policy, unless they disable overrides.

Enable users to override auto-clean settings - Enable this to allow end users to declare their own auto clean settings.

Folder Settings

If you are using the default auto-clean settings set up by your administrator, you will be shown them on this tab.

In the case that you have chosen to override the settings, click the Add Rule icon on the actions toolbar to get started.

Folder - Select the folder you would like to set auto-clean settings for.

Type - This will allow you to choose what rule you want the auto clean to follow, size or date.

Folder size BEFORE auto-clean - Once the folder reaches this size (in megabytes), the auto-clean process is started, and older messages are cleaned.

Folder size AFTER auto-clean - This is the goal size for the auto-clean process. It will try to delete older messages until the folder gets to this size. This number should always be lower than the "before" number.

Import LDAP Users

This feature is only available in SmarterMail Enterprise edition.

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 in SmarterMail Enterprise edition.

User groups are used to give permissions to specific subsets of users on the domain to access shared resources. By default, SmarterMail starts with the two user groups below which are considered "special" groups and thus 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.

Default User Settings

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

Domain Administrators have the ability to make changes to their domain and then carry those changes to a specific user, or can implement those changes for all users on their domain.

To get started, click the Settings button on the main toolbar, then select User Propagation from the Advanced Settings tree view.

Once all changes are made to your satisfaction, click the Propagate Now icon from the actions toolbar. This will make all changes for either your use you specified or the entire domain.

Additional Help Topics

Listserv commands

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

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.

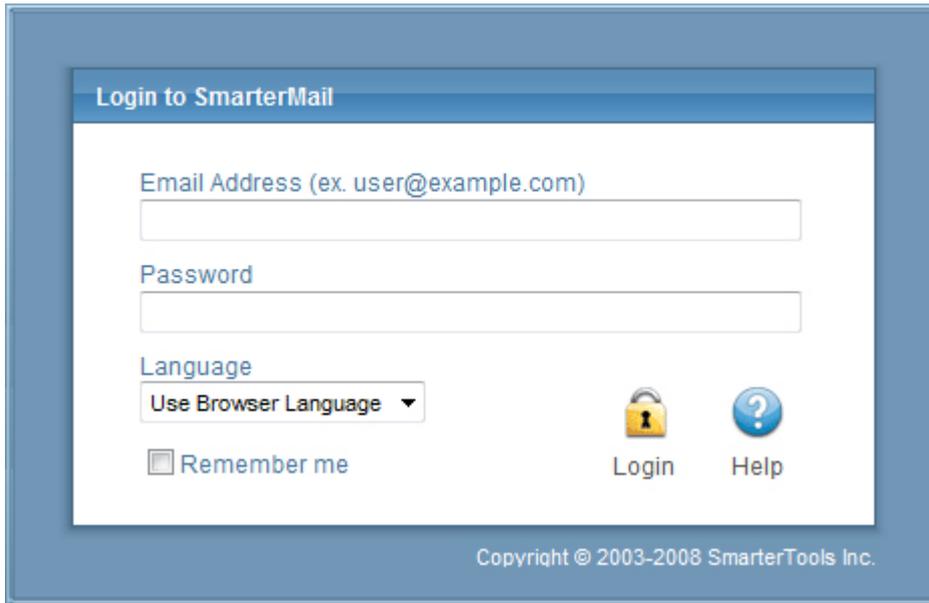
To set a catch-all alias, first create an alias in your domain to be the catch-all. Then click the Settings button on the main toolbar and select Alias in the Accounts folder under the Domain Settings tree view. Click the Set Catch-All icon on the action toolbar and choose the alias you wish to use as the catch-all, and click on the Save icon from the actions toolbar.

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

[Help for System Administrators](#)

How to Login - System Admin

You will need to open a web browser to the location of your SmarterMail installation. By default, this URL is `http://127.0.0.1:9998` (if running the browser on the server itself, otherwise use the IP address of the server instead of 127.0.0.1), but it may be different if you have changed the location of SmarterMail.



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

By checking the "Remember Me" box SmarterMail encrypts your login and password. You can then close the browser window and not have to re-log in when you return. This function works as long as you do not "log out" of SmarterMail prior to closing your browser window. If you do log out, you will have to log back in upon your return, regardless of whether the "Remember Me" box was checked or not. You will need cookies enabled on your browser for this feature to work.

Manage

Create a New Domain

To create a new domain, click the Manage button on the main toolbar and click the New Domain in the left tree view. The domain settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following domain options:

- Name - The name of the domain. For example, smartermail.com or example.com. Note: To send or receive mail, the domain name must match the domain name registered with the DNS server.
- IP Address - The IP address for which the domain will check for incoming requests. Note:

This setting does not affect Web interface login and is only used to check for SMTP, POP, and IMAP traffic. This IP address should match at least one MX record on your DNS server.

- Folder Path - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved. Note: If the directory does not already exist, it will be created. This directory should be solely dedicated to SmarterMail.
- Mailing List Username - The email address for which listserv commands are emailed.
- Domain Administrator Username - The identifier the domain administrator uses to log in to SmarterMail. The domain administrator is responsible for adding and deleting email accounts, and setting specific configurations for the domain.
- Domain Administrator Password - The password associated to the domain administrator username.
- Disable Domain - Select this option to disable the domain. Disabled domains cannot send or receive email and users cannot log in to the Web interface. This option is a good way to temporarily shut off a domain without deleting it.

Technical

Use this tab to specify the following technical settings:

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

- Forwarding Exclusions - To prevent the system from forwarding messages based on the spam level of the message, select the appropriate option from the list.
- Require SMTP Authentication - Select this option to require SMTP authentication when sending email. Note: If this option is enabled, users must provide an email address and password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.
- Enable once per day per sender auto-responder - Select this option to limit how frequently an auto-responder is sent.
- Disable Greylisting - Select this option to disable greylisting.
- Enable users to opt out of LDAP listings - Select this option to allow users to remove themselves from the Global Address List.

Features

Use this tab to enable or disable the following features:

- Enable Calendar - Select this option to allow users to use the calendar feature.
- Enable Catch-alls - Select this option to allow users to use catch-all email addresses.
- Enable Contacts - Select this option to allow users to use the contacts feature.
- Enable Content Filtering - Select this option to allow users to use content filtering.
- Enable Control of Service Access - Select this option to give users access to POP, IMAP, SMTP and Webmail services.
- Enable Domain Aliases - Select this option to allow domain administrator to create domain aliases.
- Enable Domain Reports - Select this option to provide additional reports for domain administrators.
- Enable Email Reports - Select this option to provide the ability to email reports.
- Enable IMAP Retrieval - Select this option to allow users to download POP email from third-party mail servers.
- Enable Mail Signing - Select this option to enable email verification via mail signing.
- Enable Mailing Lists - Select this option to allow domain administrators to create and use mailing lists to send mass emails.
- Enable Notes - Select this option to allow users to use the notes feature.
- Enable POP Retrieval - Select this option to allow users to download IMAP email from third-party mail servers.
- Enable Spam Filtering - Select this option to allow domain administrators to override the spam filtering settings.
- Enable SyncML - Select this option to allow users to sync SmarterMail with Outlook, Thunderbird, and most smartphones using SyncML.

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

Limits

Use this tab to specify the following limits:

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

Sharing

This tab is only available in SmarterMail Enterprise edition.

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

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

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

Priority

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

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

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

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

Throttling

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

Use this tab to edit the following throttling settings:

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

Event Restrictions

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

Alias

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

Collaborate

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

Email

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

Mailing List

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

Throttling

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

User

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

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

View Logs

This page allows administrators to get quick access to a domains log files. Administrators can view log files by utilizing this page, or they can download the selected log file as a .zip file by clicking the Download icon from the Actions toolbar.

Log file settings can be configured by clicking the Settings button from the main toolbar, and then selecting Log Settings from the left tree view.

Date - Enter the date which you would like to view log files from.

Type - Select the delivery method from the drop down box that you would like to analyze.

Search String - Enter a string of words that you would like to search.

Enable Related Traffic - Enable this box if you would only like data shown that occurred within the same session.

Note: SmarterMail will show logs files up to 1MB.

Enabling and Disabling Services

Arrive at this page by clicking the Manage button on the main toolbar, then selecting Services from the left tree view. This page allows system administrators to enable and/or disable specific services on the mail server. Generally, all of these services should be enabled.

To view the status of the services, click Manage in the main toolbar and then click Services in the left tree view. The list of available services will load in the content pane and the following columns will be available:

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

The following options will be available in the actions toolbar:

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

Services

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

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

Create a New Domain

To create a new domain, click the Manage button on the main toolbar and click the New Domain in the left tree view. The domain settings will load in the content pane and the following tabs will be available:

Options

Use this tab to specify the following domain options:

- Name - The name of the domain. For example, smartermail.com or example.com. Note: To send or receive mail, the domain name must match the domain name registered with the DNS server.
- IP Address - The IP address for which the domain will check for incoming requests. Note: This setting does not affect Web interface login and is only used to check for SMTP, POP, and

IMAP traffic. This IP address should match at least one MX record on your DNS server.

- Folder Path - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved. Note: If the directory does not already exist, it will be created. This directory should be solely dedicated to SmarterMail.
- Mailing List Username - The email address for which listserv commands are emailed.
- Domain Administrator Username - The identifier the domain administrator uses to log in to SmarterMail. The domain administrator is responsible for adding and deleting email accounts, and setting specific configurations for the domain.
- Domain Administrator Password - The password associated to the domain administrator username.
- Disable Domain - Select this option to disable the domain. Disabled domains cannot send or receive email and users cannot log in to the Web interface. This option is a good way to temporarily shut off a domain without deleting it.

Technical

Use this tab to specify the following technical settings:

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

level of the message, select the appropriate option from the list.

- **Require SMTP Authentication** - Select this option to require SMTP authentication when sending email. Note: If this option is enabled, users must provide an email address and password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.
- **Enable once per day per sender auto-responder** - Select this option to limit how frequently an auto-responder is sent.
- **Disable Greylisting** - Select this option to disable greylisting.
- **Enable users to opt out of LDAP listings** - Select this option to allow users to remove themselves from the Global Address List.

Features

Use this tab to enable or disable the following features:

- **Enable Calendar** - Select this option to allow users to use the calendar feature.
- **Enable Catch-alls** - Select this option to allow users to use catch-all email addresses.
- **Enable Contacts** - Select this option to allow users to use the contacts feature.
- **Enable Content Filtering** - Select this option to allow users to use content filtering.
- **Enable Control of Service Access** - Select this option to give users access to POP, IMAP, SMTP and Webmail services.
- **Enable Domain Aliases** - Select this option to allow domain administrator to create domain aliases.
- **Enable Domain Reports** - Select this option to provide additional reports for domain administrators.
- **Enable Email Reports** - Select this option to provide the ability to email reports.
- **Enable IMAP Retrieval** - Select this option to allow users to download POP email from third-party mail servers.
- **Enable Mail Signing** - Select this option to enable email verification via mail signing.
- **Enable Mailing Lists** - Select this option to allow domain administrators to create and use mailing lists to send mass emails.
- **Enable Notes** - Select this option to allow users to use the notes feature.
- **Enable POP Retrieval** - Select this option to allow users to download IMAP email from third-party mail servers.
- **Enable Spam Filtering** - Select this option to allow domain administrators to override the spam filtering settings.
- **Enable SyncML** - Select this option to allow users to sync SmarterMail with Outlook, Thunderbird, and most smartphones using SyncML.

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

Limits

Use this tab to specify the following limits:

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

Sharing

This tab is only available in SmarterMail Enterprise edition.

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

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

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

Priority

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

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

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

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

Throttling

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

Use this tab to edit the following throttling settings:

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

Event Restrictions

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

Alias

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

Collaborate

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

Email

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

Mailing List

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

Throttling

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

User

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

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

Spool

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

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

To view all of the messages in the spool, click the Manage button in the main toolbar and expand the Spool in the left tree view. Then click All Messages . To only view the messages waiting to be delivered, click the Manage button in the main toolbar and expand the Spool in the left tree view. Then click Waiting to Deliver .

In general the following columns are available:

- Checkbox - Use these boxes to select multiple messages. Messages must be selected before choosing an action from the actions toolbar.
- File Name - The filename on the hard disk.
- Sender - The email address that initially sent the email.
- Size - The total size of the message on the hard drive, in kilobytes.
- Recipients - The number of delivered/total recipients.
- Time in Spool - The total amount of time the message has been in the spool.
- Attempts - The number of delivery attempts that have been made.
- Next Attempt - The date and time of the next delivery attempt.
- Status - The current status of the message.
- Spool Path - The spool the message resides in. If you have subspools enabled, the message may be placed in one of those locations.
- Priority - The priority level of the message.

The following actions are available from the actions toolbar:

- Force - Clicking this button will allow the system administrator to push the message to the top of the spool. Note: The status of forced messages will not update until the server passes through the spool.

- **Reset Retries** - Clicking this button will allow the system administrator to reset the retry counts on all messages in the spool, effectively starting the delivery process over. This can be useful if a DNS or firewall problem has been recently resolved, or if you are using SmartHosting and the target server was down.
- **View** - Clicking this button will allow the system administrator to view selected message in a popup window.
- **Recipients** - Clicking this button will allow the system administrator to see who the message was sent to and the status of that message (i.e. delivered or pending).
- **Priority** - Clicking this button will allow the system administrator to change the priority level of a message.
- **Delete** - Clicking this button will allow the system administrator to delete messages from the spool. Note: No confirmation dialog will display, so use caution when deleting from the spool.
- **Refresh** - Clicking this button will allow the system administrator to update the page with the most recent contents of the spool.

User Activity

System Administrators have the ability to monitor the activity of all users on their server. Each user will be listed individually who is logged into the system. To get started with User Activity, click the Manage button from the main tool bar and then select Online Users from the User Activity tree view on the left side. They can monitor each user by the following variables:

Type - This will tell the System Admin whether they are connected with IMAP or Web mail.

IP Address - This will tell the IP Address of the user.

Start Date - This will tell the Start Date the user made the connection.

Duration - This will tell the total duration of the connection.

The System Administrator also have 3 actions he can perform from the actions tool bar&mdash: End Session , Disable User , and Search .

End Session - This will end the current session of any particular user.

Disable User - This will permanately disable the user from the system.

Search - This gives the System Admin the ability to search users on the system.

Inactive Users

System Administrators have the ability to search and find users who have been inactive from the

system. To perform this search, click the Manage button from the main toolbar, and then select Inactive Users from the left tree view.

System Administrators have four options to choose from for the search&mdash: Inactive for 30 Days, Inactive for 90 Days, Inactive for 6 months, and Inactive for 12 months.

Current Connections

SmarterMail will monitor the server and see who is connecting via the different protocols&mdash: SMTP, IMAP, and POP. System Administrators can then blacklist a certain user by clicking the Blacklist icon on the actions toolbar if they believe a user is making too many connections.

Users can be viewed by All Connections from the left tree view, or by each protocol individually.

Current Blocks

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

Email harvesting can also be monitored, which is the process of obtaining lists of e-mail addresses using various methods for use in bulk e-mail or other purposes usually grouped as spam.

System Administrators can then click the Delete icon from the actions toolbar to remove anyone from the list.

Mass Messaging

SmarterMail gives System Administrators the opportunity to send mass emails and reminders to selected groups.

Send Email

To get started with a mass email, click the Manage button on the main toolbar, then select Send Email from the Mass Messaging tree view. After clicking Send Email you will be asked to populate the following fields:

From - Enter here who the email is from. "System Administrator" will be entered as a default.

To - Choose from the drop down menu who you want to receive the email. (All Users, All Users on Domain, All Domain Administrators, Specific User) If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.

Subject - Enter the subject of the email in this field.

Message - Enter the message you would like to send.

Once you complete all the fields, click the Send icon in the actions toolbar to send the message.

Send Reminder

To get started with a mass email, click the Manage button on the main toolbar, then select Send Reminder from the Mass Messaging tree view. After clicking Send Email you will be asked to populate the following fields:

To - Choose from the drop down menu who you want to receive the email. (All Users, All Users on Domain, All Domain Administrators, Specific User) If All Users on a Domain is chosen, you will then be asked to enter the domain name. If you choose Specific User you will be asked to enter a Specific User's email address.

Subject - Enter the subject of the email in this field.

Message - Enter the message you would like to send.

Once you complete all the fields, click the Send icon in the actions toolbar to send the message.

Message Archive Search

This feature is only available in SmarterMail Enterprise edition.

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

To search the archive, click the Manage button in the main toolbar and click Message Archive Search in the left tree view. 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 the Email button in the main toolbar and clicking Message Archive Search in the left tree view.

For more information on archiving, see Message Archiving .

Reports

Reports Overview

System administrators, domain administrators, and individual users can use real-time mail server statistics, historical summary reporting, and detailed trend analysis at the system, domain, and user

levels to understand the performance of their systems. With dozens of pre-defined reports, SmarterMail provides critical statistics that help system and domain administrators monitor their systems.

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

Settings

General Settings

To access the general settings for SmarterMail server, click the Settings button on the main toolbar, then click the Settings navigation pane and click General Settings in the left tree view. The general settings will load and the following tabs will be available:

Administrator

Use this tab to specify the following settings:

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

Login Access

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

Server Info

Use this tab to specify the following server settings:

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

Spool

Use this tab to specify the following spool settings

- **Spool Path** - The full path in which messages are stored prior to delivery. If you are using a real-time virus scanner, this is the path that must be scanned in order to properly handle viruses.
- **SubSpools** - SubSpools are within the spool path and allow SmarterMail to work around the NTFS limitation of 30,000 objects in an individual folder. SmarterMail will utilize subspools by allocating up to 10,000 messages per subpool. (Default is 10)
- **Delivery Delay** - This number of seconds mail will be held in the spool before it is delivered. A delivery delay is beneficial when you are running a secondary service (such as a virus checker) that needs access to messages prior to delivery, as it provides ample time for the secondary service to interact with the message. By default, the delivery delay is 15 seconds.
- **Retry Intervals** - When the mail server is unable to contact the receiving server, the email

attempting to be sent is held for a period of time before attempting to be resent. This is the time between retries. Users can specify multiple retry attempts to resend emails before it is bounced. By default, this is set to 4 attempts - at 15 min, 30 min, 60 min, and 90 min intervals.

- Attempts before bouncing DNS errors - The maximum number of attempts SmarterMail should make before the message is bounced due to a DNS error. The most common cause of a DNS error is a misspelled domain. Limiting the number of attempts before DNS errors are bounced is beneficial because messages will not sit in the queue for long periods of time processing unnecessary messages and possibly slowing the system down. This will be helpful to users because messages will be bounced sooner and will give users the opportunity to fix any mistakes and get a message resent. By default, the server will make 2 attempts. Note: Setting this at 1 retry can be dangerous if the DNS server fails or if there is a loss of Internet connectivity. To disable this feature, set the number of bounces equal to the number of retry intervals.
- Command-Line File to Run on New Mail - Enable this and enter the full path to an executable you wish to use to process incoming messages. Use %filepath as an argument to pass the path of the email file to the executable. It is allowable for the executable to delete the message to prevent delivery. Example: If you set this field to "c:\program files\myexe.exe %filepath", the program myexe.exe will be launched with the full path to the spool file as its first argument. Note: The command will not be executed if the Enabled box is not checked.
- Command-Line Timeout - The number of seconds that the server will wait for information from the remote server. In general, a timeout of 5 seconds should suffice.

Reports

Use this tab to specify the following settings:

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

Protocol Settings

To access the settings for standard email protocols, click the Settings button on the main toolbar, then click the Settings navigation pane and click Protocol Settings in the left tree view. The protocol settings will load and the following tabs will be available:

POP

Use this tab to specify the following POP settings:

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

IMAP

Use this tab to specify the following IMAP settings:

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

LDAP

Use this tab to specify the following LDAP settings:

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

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

SMTP In

Use this tab to specify the following incoming SMTP settings:

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

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

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

SMTP Out

Use this tab to specify the following outgoing SMTP settings:

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

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

ActiveSync Mailboxes

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

To access this section, click the Settings button on the main toolbar and click the Settings control bar. Then click ActiveSync Mailboxes in the left tree view. A list of accounts for which the Exchange ActiveSync add-on is enabled will load in the content pane.

In general, the following columns are available:

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

The following options are available from the actions toolbar:

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

Hostnames

To get started with Hostnames, click the Manage button on the main toolbar, then select Hostnames from the left tree view.

This feature allows Administrators to assign a hostname for each IP address. For example: IP 1.1.1.1 can be assigned to mail.domain1.com and IP 1.1.1.2 can be for mail.domain2.com. Prior to this addition, SmarterMail could only specify one hostname for all IPs.

Notification Profiles

Customize notification profiles for any group on your account. Assign events to your profiles which can utilize any number of notifications such as reminders, SMS, or Email.

To set your profile, click the Settings button on the main toolbar, then select Notification Profiles from the Settings folder tree view.

Adding a Profile - To add a new profile, click the New icon from the actions toolbar.

- Name - This can be any name that will help you recognize this profile.
- Email Address - If you would like a reminder sent to an email, enter it here and check the enable box.
- SMS Email - If you would like a reminder sent as a text message, enter it here and check the enable box.
- Enable Reminders - Check this box if you would like a popup window reminder for Tasks and Appointments.

Once you have completed all boxes to your satisfaction, click the Save icon from the actions toolbar.

Edit a Profile - Editing a profile can be done in three different ways:

- Select the profile that you would like to edit and then click the Edit icon from the actions toolbar, or
- Move your mouse over the profile you want to edit and right-click, then select Edit from the drop down menu, or
- Double-click the profile that you would like to edit

Deleting a Profile - Deleting a profile can be done two different ways:

- Select the profile that you would like to delete and then click the Delete icon from the action toolbar, or

- Move your mouse over the profile you want to delete and right-click, then select Delete from the drop down menu

Searching a Profile - To search your profiles, first click the Search icon from the actions toolbar. Another toolbar will appear under the actions toolbar with two boxes to populate. The first box asks for the search criteria that you would like to search for. The second box is a drop down list looking for what fields you want to search through—All Fields, Name, and Type.

Skins

The SmarterMail Web interface contains built-in skins for your convenience.

The various skins can be found by clicking the Settings button on the main toolbar, then selecting Skins from the Interface folder tree view. Users can also create custom skins to emulate their own style or that of their company.

Default Skin - These are the available skins provided by SmarterMail.

Enable ability for domains to override skin - Enable this to allow Domain Admins to choose a skin for their domain.

Log Settings

In order for you to know what activity is happening on your server, SmarterMail has multiple logging options for various parts of the mail server. Use this page to manage how logs are written and how much detail is written.

To get started, click the Settings button on the main toolbar, then select Log Settings from the Settings tree view. Settings will not be applied to any tab until you click the Save icon from the actions toolbar.

Log Files

Log Path - This is the default location for the Logs that email messages in SmarterMail produce. If you would like to change the default location, enter a new path here.

Delete Log Files After - Log files older than the number of days specified in this field will be automatically deleted when enabled.

Log Detail Levels

These settings change the amount of detail that is stored in the protocol logs. Possible values for each are shown below:

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

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

Delivery Log Level - The log level for message delivery and spool operations.

IMAP Log Level - The log level for IMAP sessions.

LDAP Log Level - The log level for LDAP sessions.

Message-ID Log - The log level for logging Message-ID's of all messages sent to mailing lists.

Event Log - The log level for event sessions.

SyncML Log Level - The log level for SyncML sessions.

POP Log Level - The log level for POP sessions.

POP Retrieval Log Level - The log level for POP retrieval sessions.

SMTP Log Level - The log level for SMTP sessions.

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

Defaults

Domain Defaults

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

To access the domain default settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Defaults folder and click Domain Defaults in the left tree view. The domain default settings will load in the content pane and the following tabs will be available:

Technical

Use this tab to specify the following technical settings:

- Folder Path - The directory in which all information (XML files, mail statistics, alias information, etc.) pertaining to the domain is saved.
- SMTP Port - The SMTP port used to connect to the email server. By default, the SMTP port is 25. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- SMTP Port (Alternate) - The SMTP port used to connect to the email server if an ISP restricts the standard port 25.
- Enabled - Check this box to enable the alternate SMTP port.
- POP Port - The POP port used to connect to the email server. By default, the POP port is 110. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- IMAP Port - The IMAP port used to connect to the email server. By default, the IMAP port is 143. Note: Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- LDAP Port - The LDAP port used to connect to the server. By default, the LDAP port is 389. Note: This is an Enterprise only feature. Changing the default port is not recommended unless you are behind a firewall that requires this setting to be changed.
- Auto-responder Exclusions - To prevent the system from sending automated messages based on the spam level of the original message, select the appropriate option from the list.
- Forwarding Exclusions - To prevent the system from forwarding messages based on the spam level of the message, select the appropriate option from the list.
- Require SMTP Authentication - Select this option to require SMTP authentication when sending email. Note: If this option is enabled, users must provide an email address and password to send email from their account. SmarterMail supports cram-md5 and login authentication methods.
- Enable once per day per sender auto-responder - Select this option to limit how frequently an auto-responder is sent.
- Disable Greylisting - Select this option to disable greylisting.
- Enable users to opt out of LDAP listings - Select this option to allow users to remove themselves from the Global Address List.

Features

Use this tab to enable or disable the following features:

- Enable Calendar - Select this option to allow users to use the calendar feature.
- Enable Catch-alls - Select this option to allow users to use catch-all email addresses.
- Enable Contacts - Select this option to allow users to use the contacts feature.

- Enable Content Filtering - Select this option to allow users to use content filtering.
- Enable Control of Service Access - Select this option to allow the domain administrator to restrict access to certain services.
- Enable Domain Aliases - Select this option to allow the domain administrator to create domain aliases.
- Enable Domain Reports - Select this option to provide additional reports for domain administrators.
- Enable Email Reports - Select this option to provide the ability to email reports.
- Enable IMAP Retrieval - Select this option to allow users to download IMAP email from third-party mail servers.
- Enable Mail Signing - Select this option to enable email verification via mail signing.
- Enable Mailing Lists - Select this option to allow the domain administrator to create and use mailing lists to send mass emails.
- Enable Notes - Select this option to allow users to use the notes feature.
- Enable POP Retrieval - Select this option to allow users to download POP email from third-party mail servers.
- Enable Spam Filtering - Select this option to allow the domain administrator to override the spam filtering settings.
- Enable SyncML - Select this option to allow users to sync SmarterMail with Outlook, Thunderbird, and most smartphones using SyncML.
- Enable Tasks - Select this option to allow users to use the tasks feature.
- Enable User Reports - Select this option to provide reports for users.

Limits

Use this tab to specify the following limits:

- Disk Space - The maximum number of megabytes allocated for the domain. By default, the domain is allocated 500 MB of disk space. Note: When this limit is reached, SmarterMail will send a warning to the domain administrator and mailboxes on the domain will not be able to receive new mail.
- Domain Aliases - The maximum number of domain aliases allowed for the domain. By default, domains are limited to two aliases.
- Users - The maximum number of mailboxes allowed for the domain. By default, domains are limited to 100 users. Note: If your SmarterMail license limits the number of mailboxes allowed on the domain, this setting will be overridden.
- User Aliases - The maximum number of alias email accounts (forwarded to a true email account) allowed for the domain. By default, domains are limited to 1,000 user aliases.
- Mailing Lists - The maximum number of mailing lists allowed for the domain. By default, this

setting is unlimited.

- POP Retrieval Accounts - The maximum number of POP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 POP email accounts.
- IMAP Retrieval Accounts - The maximum number of IMAP email accounts a user can set up in SmarterMail. By default, users can receive download messages for 10 IMAP email accounts.
- Max Message Size - The maximum size email a user can send. By default, the max message size is 10,000 KB. Note: This number includes text, HTML, images, and attachments.
- Recipients per Message - The maximum number of recipients a message can have. By default, users can send messages to 200 email addresses.

Sharing

This tab is only available in SmarterMail Enterprise edition.

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

- Enable Global Address List - Select this option to allow users on a domain to see all user profiles on the domain and participate in LDAP queries against the domain.
- Enable Shared Calendars - Select this option to allow calendars to be shared with other users on the domain.
- Enable Shared Contacts - Select this option to allow contact lists to be shared with other users on the domain.
- Enable Shared Folders - Select this option to allow email folders to be shared with other users on the domain.
- Enable Shared Notes - Select this option to allow notes to be shared with other users on the domain.
- Enable Shared Tasks - Select this option to allow task lists to be shared with other users on the domain.

Priority

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

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

- Standard Messages - The priority level for messages that don't have another priority affecting it.
- Enabled - Check this box to enable priority settings for standard messages.
- Mailing Lists - The priority level for mailing list messages.
- Enabled - Check this box to enable priority settings for mailing list messages.
- Priority When Over Size - The priority level for messages that exceed the message size threshold.
- Enabled - Check this box to enable priority settings for messages that exceed the message size threshold.
- Message Size Threshold - The maximum size a message can be without triggering the Priority When Over Size rule.
- Auto-responders - The priority level for auto-responder messages.
- Enabled - Check this box to enable priority settings for auto-responders.
- Bounces - The priority level for non-delivery receipts.
- Enabled - Check this box to enable priority settings for bounced messages.
- Email Reports - The priority level for email reports.
- Enabled - Check this box to enable priority settings for email reports.
- Event Emails - The priority level for messages reminding users of upcoming events.
- Enabled - Check this box to enable priority settings for event emails.
- Priority After Attempt X - The priority level for messages that were not successfully sent after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt X Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt X is assigned to the message.
- Priority After Attempt Y - The priority level for messages that were not successfully sent after the specified number of tries.
- Enabled - Check this box to enable priority settings for subsequent delivery attempts.
- Attempt Y Threshold - The number of retry attempts the system should make before the priority set in Priority After Attempt Y is assigned to the message.

Throttling

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

Use this tab to edit the following throttling settings:

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

Event Restrictions

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

Alias

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

Collaborate

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

Email

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

Mailing List

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

Throttling

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

User

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

Domain Propagation

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

To access domain propagation, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Defaults folder and click Domain Propagation in the left tree view. The default domain settings will load in the content pane. For more information on these settings, refer to Domain Defaults .

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

User Defaults

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

To access the user default settings, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Defaults folder and click User Defaults in the left tree view. The

domain default settings will load in the content pane. For more information on these settings, refer to [Users](#) .

User Propagation

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

To access user propagation, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Defaults folder and click User Propagation in the left tree view. The default domain settings will load in the content pane. For more information on these settings, refer to [Users](#) .

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

Routing

Forwarding Blacklist

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

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

Message Archiving

This feature is only available in SmarterMail Enterprise edition.

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

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

To view the message archiving rules for your SmarterMail installation, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Routing folder and click Message Archiving in the left tree view. A list of archiving rules will load in the content pane.

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

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

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

Outgoing Gateway

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

Options

Server Address - Enable this and add the IP address of the Gateway Server.

Auth Username - Enable this and enter the username of the gateway server given to you by your ISP.

Auth Password - Enter a password for your gateway server.

Priority Range - Set the priority range for this server.

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

SmarterMail Gateway

SmarterMail URL - The Webmail URL for the SmarterMail server being used as an outgoing gateway. This will allow the use of web services to find out how many messages are in the spool in order to do an intelligent round robin distribution.

Admin Username - The identifier used to log in to the gateway server.

Admin Password - The corresponding password used to log in to the gateway server.

Incoming Gateways

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

To access the incoming gateway settings, click the Settings button in the main toolbar and click the Settings navigation pane. Then expand the Routing folder and click Incoming Gateways in the left tree view. A list of incoming gateways will load in the content pane.

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

Options

Use this tab to XXX

- Gateway Mode - The function that the incoming gateway will perform. If the incoming gateway is set to backup MX, it will only receive messages when your primary server is down. If the incoming gateway server is set to domain forwarding, it will received all message and forward them to your primary server.
- IP Address - The IP address of the primary mail server.
- User Verification - The method used by the incoming gateway to determine if a user is valid or not. Note: If none is selected, the incoming gateway server will accept all email addresses for the domain. If Web service is selected, the incoming gateway will check with the primary mail server for a list of valid email addresses.
- Enable SmarterMail Gateway Mode - Select this option to indicate that the incoming gateway server is another SmarterMail server.
- Disable Greylisting - Select this option to disable greylisting for the domain.

Domains

This tab is only available if the gateway mode is set to domain forwarding. Domain forwarding allows you to easily send mail through one server to another. This will allow your server to act as an incoming gateway to your network, and permit you to have a single point of entry for incoming SMTP traffic.

When messages come in to a forwarded domain, they are run through the command-line exe referenced in Protocol Settings. If a delivery delay has been established for the server, messages are also delayed accordingly. This allows you to establish an incoming server that can run external virus or spam scanners, which can reduce the load on your existing network servers.

Use this tab to specify for which domains the incoming gateway will accept mail:

- Domain Verification - The method used by the incoming gateway to determine if a domain is

valid or not.

- Specified Domains - The specific domains for which the gateway will accept mail.

Spam

Use this tab to specify the following spam checks:

- Spam Low Action - The action the incoming gateway will perform on messages with a low probability of being spam.
- Spam Medium Action - The action the incoming gateway will perform on messages with a medium probability of being spam.
- Spam High Action - The action the incoming gateway will perform on messages with a high probability of being spam.

SmarterMail Gateway

This tab is only available if the SmarterMail gateway mode is enabled in the Options tab. Use this tab to specify the following settings:

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

Sender Priority Overrides

Sender priority overrides allows the system administrator to assign priority levels to specific email addresses. For example, a company may want the mail server to send emails from its support team (support@example.com) before sending emails to mailing lists.

To view the sender priority overrides, click the Settings button in the main toolbar and click the Settings navigation pane. Then expand the Routing folder and click Sender Priority Overrides in the left tree view.

To create a new sender priority override, click New in the actions toolbar. The following options will be available:

- Email Address - The email address of the user.
- Message Delivery Priority - The priority level assigned to this user's messages.
- Description - A brief summary why the sender priority override was created.

Activation

Licensing

To access view licensing information for SmarterMail or any add-ons, click the Settings button on the main toolbar and click the Settings navigation pane. Then expand the Activation folder and click Licensing from the left tree view. The edition, version, and license level information for the version of SmarterMail currently being used will load in the content pane. The licensing information for any add-ons will also display in the content pane.

The following options are available from the actions toolbar:

- Activate - Activates a new SmarterMail license key.
- Reactivate - Reactivates a SmarterMail license key.
- Details - Displays details about the license, including feature, status, expiration, limits and available trials.
- Buy Now - Allows the system administrator to purchase a new license key or add-on.
- Start Trial - Allows the system administrator to begin an available trial.

SmarterMail Self Diagnostic

Use the SmarterMail Self Diagnostic to test your SmarterMail server for errors. To access this feature, click the Settings button in the main toolbar and then click the Settings navigation pane. Then expand the Activation folder and click SmarterMail Self Diagnostic from the left tree view. SmarterMail will perform a test and display the results in a popup window.

Security

Antivirus Administration

SmarterMail is equipped with effective and self-updating ClamAV antivirus protection out-of-the-box. In addition, SmarterMail can support additional third-party solutions that include a quarantine directory. SmarterMail has the ability to check the quarantine directory and respond to users that attempted to send an email containing a virus.

To view the antivirus settings for your server, click the Security button in the main toolbar and then click Antivirus Administration in the left tree view. The antivirus settings will load in the content pane and the following tabs will be available:

Options

- Enable ClamAV - Select this checkbox to enable ClamAV.
- Enable Real-Time AV - Select this checkbox to enable Real-Time AV.
- Enable Command-Line AV - Select this checkbox to enable a command-line virus scanner.

ClamAV

Clam AntiVirus is a third-party open source antivirus toolkit, designed especially for scanning email on mail gateways. For more information on ClamAV, visit: www.clamav.com

- IP Address - The IP address of the ClamAV server to use.
- Port - The port that the ClamAV server is listening on.
- Remote Server - Select this checkbox if the server is a remote server.
- Timeout - The maximum number of seconds to wait before moving on. By default, the timeout is 10 seconds.
- Failures Before Disable - The maximum number of timeouts allowed before ClamAV is disabled. By default, ClamAv is limited to 5 failures.
- Virus Definitions - The date and time the virus definitions were last updated. The definitions are updated whenever the service starts and every 6 hours thereafter. To manually update virus definitions, click Update ClamAV in the actions toolbar.

Real-Time AV

- Quarantine Directory - The full path to the quarantine directory for the server.
- Virus Action - The action taken when an email contains a virus. The available actions are:
 - Delete - Deletes any files attached to the message from the spool directory. This does not take any action on the quarantine directory.
 - Inform Sender - Informs the "From" address that a message was received by the server, and because a virus was found in the message, it did not reach the intended recipient. Note: With some of the more recent viruses, this action becomes less useful, as many viruses now spoof the "From" email address.

Command-line AV

- Command Line - The command that you want to execute. %FILEPATH will be replaced with the path to the file to be scanned.

Commtouch Zero-hour Antivirus

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

Commtouch evaluates each message and determines the probability that the message contains a virus. System administrators can choose the default action taken on a message when Commtouch determines the it has a medium, high, or definite probability of containing a virus. For more information, or to purchase this add-on, visit the SmarterTools website .

Antispam Administration

SmarterMail's antispam features allow you to be as aggressive as you want when combatting spam. Initial antispam settings were configured during installation, but these settings can be modified at any time.

Due to the flexible nature of SmarterMail's antispam setup, spam checks can influence the spam decision as much or little as you want. When spam protection runs on a particular email, all enabled spam checks are performed on the email. The total weight of all failed tests is what comprises the spam weight for the email. A spam probability level is then assigned to the email using the settings in the Filtering tab.

In short, when an email comes in, spam checks are run on it. The checks that fail add points to the email, which then put the email into a category of spam probability.

To view the antispam settings for your server, click the Security button in the main toolbar and then click Antispam Administration in the left tree view. The antispam settings will load in the content pane and the following tabs will be available:

Spam Checks

Use this tab to select the spam options that you want to enable for filtering (a point-based weighting system for filtering spam) and for blocking at the SMTP level. Weights can also be edited for the various checks from this tab. Note: Only enabled spam checks are used when calculating spam weight. To enable or disable a check, select the appropriate checkbox and click Save .

The following types of spam checks are available. In most cases, selecting the desired spam check and clicking Edit will allow you to set various properties.

Declude

Declude integration allows you to use Declude products in conjunction with the SmarterMail weighting system. Declude addresses the major threats facing networks, and are handled by a multi-layered defense. Configuration of Declude is done through the Declude product, and all you need to do in SmarterMail is enable the spam check. Declude score will be included on spam line. For more information, visit www.declude.com .

SpamAssassin-based Pattern Matching

SmarterMail includes a proprietary pattern matching engine built upon the SpamAssassin technology.

- Low Spam Weight - The weight that will be assigned if the pattern matching engine determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if the pattern matching engine determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if the pattern matching engine determines a high probability of spam.
- Header Log Level - The amount of information the pattern matching engine inserts into the header of the message.

Remote SpamAssassin

SpamAssassin is a powerful, third party open source mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. By default, SpamAssassin will run on 127.0.0.1:783. For more information, or to download SpamAssassin, visit spamassassin.apache.org .

SmarterMail can use SpamAssassin with its weighting system:

- Low Spam Weight - The weight that will be assigned if SpamAssassin determines a low probability of spam.
- Medium Spam Weight - The weight that will be assigned if SpamAssassin determines a medium probability of spam.
- High Spam Weight - The weight that will be assigned if SpamAssassin determines a high probability of spam.
- Client Timeout - The timeout that SmarterMail will impose on a server if it cannot connect.
- Max Attempts per Message - The number of times SmarterMail will attempt to acquire a SpamAssassin score for an email.
- Failures Before Disable - The number of times a remote SpamAssassin server can fail before it is disabled.
- Disable Time - The length of time before the SpamAssassin server is re-enabled.

- Header Log Level - The amount of information SpamAssassin inserts into the header of the message

Commtouch Premium Antispam

The Commtouch Premium Antispam add-on uses Recurrent Pattern Detection technology to protect against spam outbreaks in real time as messages are mass-distributed over the Internet. Rather than evaluating the content of messages, the Commtouch Detection Center analyzes large volumes of Internet traffic in real time, recognizing and protecting against new spam outbreaks the moment they emerge. For more information, or to purchase this add-on, visit the SmarterTools website .

Custom Headers

Email can be assigned spam weights based on headers in the message. To configure weights for custom headers, complete the following fields:

- Header - The custom header to search for in the email message.
- Value - The value of the custom header.
- Weight - The amount to add to the email message's spam weight.

Custom Body Rules

Email can be assigned spam weights based on the body text of a message. For example, the system administrator can create a rule that assigns a specific spam weight to all messages containing the word "viagra" in the body text. To configure weights for custom body rules, complete the following fields:

- Rule Name - The name of the rule.
- Rule Type - The type of rule you use to evaluate the text for a match. Rule types are contains, wildcard or regular expression.
- Weight - The amount to add to the email message's spam weight.
- Rule Text - The text that triggers the custom body rule.

Bayesian Filtering

Bayesian filtering uses statistical analysis to identify whether or not an email appears to be spam. Bayesian filtering "learns" from previous spam-marked messages to progressively improve performance. Tying it together with blacklists and SPF allows you to be quite sure that email is or is not spam.

- Weight - The default weight for this spam check. If an email has a high probability of being spam based on its content, this is the value that will be added to the message's total spam weight.
- Max memory to allocate for filtering - Bayesian filtering can be memory intensive. As a result,

SmarterMail allows you to configure the maximum resources that will be dedicated to Bayesian filtering. In general, the more memory you reserve for Bayesian filtering, the more accurate the results will be.

- Messages required for filter update - Once this number of messages have been processed as known-good or known-spam email, SmarterMail will reanalyze the filters to help your system protect against new spam threats. In this way, Bayesian filtering can become more tailored to handle the mail of the domains on the server.

DomainKeys

DomainKeys is an email authentication system designed to verify the DNS domain of an email sender and the message integrity. The DomainKeys specification has adopted aspects of Identified Internet Mail to create an enhanced protocol called DomainKeys Identified Mail (DKIM).

SPF (Sender Policy Framework)

SPF is a method of verifying that the sender of an email message went through the appropriate email server when sending. As more and more companies add SPF information to their domain DNS records, this check will prevent spoofing at an increasing rate.

- Pass Weight - Indicates that the email was sent from the server specified by the SPF record (more likely good mail). The weight you set may be 0 (for no effect) or a negative number, thereby reducing the spam rating.
- Fail Weight - Indicates that the email was sent from a server prohibited by the SPF record (highly likely spam). Set this to a relatively high weight, as the probability that the email was spoofed is very high.
- SoftFail Weight - Indicates that the email was sent by a server that is questionable in the SPF record. This should either be set to 0 or a low spam weight.
- Neutral Weight - Indicates that the SPF record makes no statement for or against the server that sent the email. Except in very special circumstances, leave this set to 0.
- PermError Weight - Indicates that there is a syntax error in the SPF record. Since SPF is relatively new, some domains have published improperly formatted SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.
- None Weight - Indicates that the domain has no published SPF record. Since SPF is relatively new, many legitimate domains do not have SPF records. It is recommended that you leave this at 0 until SPF becomes more widely adopted.

Reverse DNS (Domain Name Server)

Reverse DNS checks to make sure that the IP address used to send the email has a friendly name associated with it.

- Weight - The default weight for this spam check. If an email sender does not have a reverse DNS entry, this is the value that will be added to the message's total spam weight.

RBL Lists (Real-Time Blacklists)

RBL lists (also known as IP4R Lists) are publicly accessible lists of known spammer IP addresses. These lists can be a very important part of spam protection. To attach to a list, click Add List in the actions toolbar.

- Name - A friendly name for the list that will help you and your customers identify it.
- Description - This field allows you to store additional information about the list.
- Weight - The default weight for this spam check. If an email sender is listed with the spam list, this is the value that will be added to the message's total spam weight.
- Hostname - The hostname of the RBL.
- Required Lookup Value - The expected value returned from an RBL if the sender's IP is listed with the RBL provider..
- Enable bitmap checking - XXX
- DNS Server - Spam lists operate through DNS. As a result, each list provider gives out a DNS server that contains the blacklist. Enter it in this box.

Filtering

Emails are filtered into one of four categories based on their total weight. If a weight is equal to or higher than a certain category, then it is assigned that probability of being spam. Use the Actions tab to define the weight thresholds and the default actions at each level. Note: Users can override these settings if you permit them to.

- Weight Threshold - The email is sorted into probability levels based on the weight threshold values.
- Default Action - The action to take when a message ends up with this probability.
- Text to Add - This is the text that will be displayed when a message reaches a particular level of spam.

SMTP Blocking

This tab allows you to set up extra spam checks that block emails at delivery if a certain amount of spam checks fail.

- Incoming Weight Threshold - Enable this and an incoming email must score this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)
- Greylist Weight Threshold - Enable this and an incoming email must score this value or higher

to be greylisted. (Default is 30)

- **Outgoing Weight Threshold** - Enable this and an outgoing email must score this value or higher in order to be blocked. The score is established by the settings on the Spam Checks tab. (Default is 30)

Options

This tab contains options relating to the processing of spam and overridability.

- **Auto Responders** - Allows you to restrict what types of auto-responses are permitted for the system. Certain anti-spam organizations are starting to block those servers that auto-respond to spam traps. To reduce the possibility of this occurring, set the auto-respond option to be as restrictive as your clients will permit.
- **Content Filter Bouncing** - As with auto-responses, certain anti-spam organizations also blacklist those servers that send bounce messages back to spam trap accounts. SmarterTools recommends setting this option to be as restrictive as your clients will allow.
- **Enable domains to override filter weights and actions** - Many domain administrators have their own opinions on what spam checks work best for their domain. Enable this to allow them to override the spam options if they wish.
- **Enable bounces for Outgoing SMTP Blocking** - Enable this to give a user a notification when a mail message has not been sent due to spam.
- **Enable Spool Proc Folder** - Enable this to have SmarterMail place messages into this folder to be analyzed in the background. While the messages are in the Spool Proc folder, .hdr can manipulate elements of the message, such as edit, write, and add headers. Once the scan has been completed, the message will be placed back into the spool and handled by SmarterMail from that point on.
- **Disable spam filtering on intra-domain email** - Check this to disable spam filtering when messages are sent from from within the same domain (e.g. user1@example.com to user2@example.com).
- **Disable spam filtering on SMTP whitelisted IP Addresses** - Check this to disable spam filtering on IP Addresses which have been added to a whitelist.
- **Enable Catch-All accounts to send auto-responders and bounce messages** - Enable this if you rely on auto-responders being sent when a message comes in through a catch-all. In general, this is a bad idea, so it should be left unchecked unless your situation specifically requires it.

Bypass Gateways

This tab gives administrators the ability to enter an IP Address or an IP Range of an incoming gateway. SmarterMail will analyze the .EML file and pull the most recent IP Address from the header which will usually be an organizations incoming gateway. By inputting that IP Address on this page

will allow SmarterMail to analyze the IP of the originating server rather than focusing on the gateway that SmarterMail received the message from. This is important because the majority of the time an organizations incoming gateway will not be listed on any RBL lists, but the originating server may be.

To add an IP Address or IP Range, click the Add IP icon from the Actions toolbar.

Greylisting

What is Greylisting and how does it work?

Greylisting is a new tool in the fight against spam. It will temporarily block incoming mail from a sender and then returns the mail to the sender's mail server with a message saying effectively, "try again later." The sending server must then retry sending the mail after the Block Period but before the Pass Period (see below for definitions of these values).

Greylisting is effective because spammers will not usually bother to attempt a second delivery, but legitimate e-mail servers will.

Why use Greylisting?

Greylisting is a very effective method of spam blocking that comes at a minimal price in terms of performance. Most of the actual processing that needs to be done for Greylisting takes place on the sender's server. It has been shown to block upwards of 95% of incoming spam simply because so many spammers don't use a standard mail server which would do automatic retries.

How do I set up Greylisting?

Note: You must be a system administrator to change Greylisting settings.

In order to set up Greylisting, click the Security button on the main toolbar, then select Greylisting from the Email Protection folder tree view.

- Block Period - The period of time (in minutes) that mail will not be accepted (default 15 minutes).
- Pass Period - The period of time (in minutes) in which the sender's mail server has to retry sending the message (default 360 minutes).
- Record Expiration - The period of time(in days) that the sender will remain immune from greylisting once it has passed (default 36 days).
- Enable Greylisting - If this is enabled it will allow Greylisting to happen.
- Enable Users to Override Greylisting - Enable this to allow users to selectively turn off Greylisting (useful if you have an account that receives time sensitive mail).

- Enable Greylisting to SmartHosts - If this feature is enabled, it will determine whether or not SmartHosts are governed by Greylisting. This is determined by evaluating the MX record of the recipient's address and matching it against the IP address of any target server IP address configured in the SmartHost settings area. For more information, see the SmarterHosts section of the online help. System administrators should note that the following cases are exempt from Greylisting:

- Whitelisted IPs for SMTP or Greylisting
- Anyone who authenticates (includes SMTP Auth Bypass list)
- Trusted senders
- Anyone who has already sent you an email
- Any IP in the greylistBypass.xml file

Disadvantages of Greylisting

The biggest disadvantage of Greylisting is the delay of legitimate e-mail from servers not yet verified. This is especially apparent when a server attempts to verify a new user's identity by sending them a confirmation email.

Some e-mail servers will not attempt to re-deliver email or the re-delivery window is too short. Whitelisting can help resolve this.

Blacklist / Whitelist

From this page you can control which IP addresses are blacklisted (not allowed) from mail services on this machine, or whitelisted (trusted) to access the mail services on this machine.

To get started with Blacklists, click the Security button on the main tool bar, then select Blacklist from the Security folder tree view.

To get started with Whitelist, click the Security button on the main tool bar, then select Whitelist from the Security folder tree view.

Note: Whitelisted IP addresses are not subject to relay restrictions which you may have imposed. Exercise caution when granting whitelist status to a server, and be sure that you know what services on that server may send mail through your server.

New icon - Click on this button to add an IP address or an IP address range to the list.

Edit icon - Click on a row to edit the whitelist or blacklist settings for the entry.

Delete icon - Click on this link to remove an entry from the list.

Adding / Editing an Entry

IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to add only a single IP (ex: 192.168.1.26).

IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be added (ex: 192.168.1.1 - 192.168.1.255).

Blacklist or Whitelist SMTP / POP / IMAP / Greylisting - Check the boxes for the protocols you wish to include in the blacklist or whitelist entry. The Greylisting checkbox is only available for whitelisted IPs, and if checked, the whitelisted IP will not be greylisted.

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SMTP Authentication Bypass

SMTP Authentication is a security measure that can be very beneficial in the fight against spam and unauthorized email. Unfortunately, some applications do not have support for SMTP authentication when sending mail. Most often, these are web sites that have automated mail sending mechanisms.

The solution is to add the IP addresses of the servers/sites to SmarterMail's SMTP Authentication Bypass. Any IP address entered into this page will not be asked to provide an SMTP Authentication login. In this list you can see all IP addresses that are bypassing SMTP Authentication.

To get started, click the Security button on the main toolbar, then select SMTP Authentication Bypass from the Security folder tree view.

New Icon - Click on this button to add additional IP addresses to the bypass. More information can be found below.

Edit Icon - Editing and item can be done three ways:

- Select the item and then choose the Edit icon from the actions toolbar, or
- Right-click the item and choose Edit from the drop down list, or
- Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

- Select the item and click the Delete icon from the actions toolbar, or
- Right-click the item and select Delete from the drop down list

Adding a Bypass

IP Address - Enter a single IP address in dotted quad notation (X.X.X.X) in this box if you want to bypass only a single IP (ex: 192.168.1.26).

IP Range - Enter a range of IP addresses in the two boxes, and all IP addresses that are contained in the range will be bypassed (ex: 192.168.1.1 - 192.168.1.255).

Advanced Settings

Abuse Detection

SmarterMail has several methods of preventing abuse and Denial of Service (DoS) attacks. The ones that can be configured are explained below. Any number of detection methods can be added.

To get started, click the Security button on the main toolbar, then select Abuse Detection from the Security folder tree view.

Once you arrive on the Abuse Detection screen, you will see three icons on the actions toolbar— New , Edit , and Delete .

When clicking the New icon on the actions toolbar you will have these options:

Denial of Service (DoS) Prevention - Too many connections from a single IP address can indicate a Denial of Service (DoS) attack. Enable this option to block IPs that are connecting too often to the server. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists or make many connections if you enable this option.

- Service Type - Select the service that will be monitored for this type of attack (POP/SMTP/IMAP/LDAP).
- Time Frame - The period of time in the past that is examined to determine if an IP address should be blocked. Too many connections in this period of time, and a block will be initiated.
- Connections Before Block - The number of connections before a block is placed. It is common for several connections to be open at once from an IP address. Set this to a relatively high value so that you can catch DoS attacks while not impacting legitimate customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

Bad SMTP Sessions (Email Harvesting) - A bad session is any connection that ends without successfully sending a message. Many bad sessions usually indicate spamming or email harvesting. Leaving all of these options set to 0 (zero) will disable this type of abuse detection. It is recommended that you whitelist any trusted IP addresses that may send out large mailing lists if you enable this option.

- Time Frame - The period of time in the past that is examined to determine if an IP address should be blocked. Too many bad sessions in this period of time, and a block will be initiated.
- Bad Sessions Before Block - The number of bad sessions before a block is placed. A few bad sessions happen once in a while, for instance when a person sends an email to an email account that does not exist. It is not these people that you are targeting, but rather those that are attempting to compromise or harass your customers.
- Time to Block - The number of minutes that a block will be placed once an IP hits the threshold.

Internal Spammer Detection and Notification - Enabling this feature in SmarterMail will alert an administrator whenever a multiple emails are received on the server of the same size.

- Time Frame - The period of time in the past that is examined to determine if an alert should be sent. Too many duplicate emails in this period of time, and an alert will be sent.
- Messages Before Notify - After this many duplicate messages are received within the time period specified, the email notification is sent.
- Email to Notify - The administrator account to which the notification will be sent.

Edit Icon - Editing and item can be done three ways:

- Select the item and then choose the Edit icon from the actions toolbar, or
- Right-click the item and choose Edit from the drop down list, or
- Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

- Select the item and click the Delete icon from the actions toolbar, or
- Right-click the item and select Delete from the drop down list

Password Requirements

Minimum Password Length - This will allow System Administrators to designate the minimum numbers of characters a password requires.

Password Strength Requirements - The System Administrator is able to set the requirements for passwords and, as a result, all users must adhere to those standards. The password options available to the System Administrator are: Number, Capital Letter, Lower Case Letter, Symbol, Not User Name.

SMTP Blocked Senders

The SMTP Blocked Sender list is an effective method for temporarily canceling a domain or individual user's ability to send email on the server. For example, if a particular account is sending an abnormal amount of email, you can add their address to Blocked Senders and they will be unable to send email until you remove them from the Blocked Senders list. Users and/or domains can be left on the list for whatever time you deem appropriate, and can be an effective stop-gap versus actually deleting the user and/or domain from the server.

To get started, click on the Security button on the main toolbar, then select SMTP Blocked Senders from the Security folder tree view.

Blocked Senders - Enter the email addresses or domain names you want to block, one per line. The asterisk (*) wildcard symbol is permitted in the list.

SSL

This page is available in Enterprise Edition only

SmarterMail allows System Administrators to add Secure Socket Layer (SSL) and Transport Layer Security (TLS) rules.

To get started click the Security button on the main toolbar, then select SSL from the Security folder tree view.

When adding a new rule there are several fields that need to be addressed. These fields are:

IP Address - This is the IP address where SmarterMail will listen.

SMTP, POP, IMAP - Determines on which port SmarterMail will listen for the respective protocol.

Type - Sets the type of rule you would like to add, SSL or TLS. SSL always assumes the connection will be secure, and therefore, sends the encryption immediately. TSL connects normally, and then looks to see if the connection is secure before sending the encryption.

Certificate Path - The path to the certificate file on the server. Typically, named a *.cer file.

- The certificate you are using must be added to the Certificates Microsoft Management Console within your Windows operating system. In addition, you must associate the Private Key with this same certificate.

Please Note: When removing a SSL rule, the System Administrator will need to perform a service restart.

Edit Icon - Editing and item can be done three ways:

- Select the item and then choose the Edit icon from the actions toolbar, or
- Right-click the item and choose Edit from the drop down list, or
- Double-click the item you would like to edit

Delete Icon - Deleting an item can be done two ways:

- Select the item and click the Delete icon from the actions toolbar, or
- Right-click the time and select Delete from the drop down list

SpamAssassin

SpamAssassin is a powerful, free mail filter used to identify spam. It utilizes a wide array of tools to identify and report spam. These include:

- Header and text analysis
- Bayesian filtering
- DNS blocklists
- Collaborative filtering databases

Adding a SpamAssassin Server

To add a SpamAssassin server go to the SpamAssassin page in the Security menu. Here you will be presented with a list of servers currently set up to run SpamAssassin checks. To edit one of these servers simply click on it in the list, see below for a complete list of options. To add a new server simply click the Add SpamAssassin Server button, see below for a complete list of options. When you are finished adding the server click on the save button to add it to the list. For more information on downloading and installing SpamAssassin on your server please check out their website .

Add SpamAssassin Server Form

- Name - The name you wish to call this server
- IP Address - The IP address of the server running SpamAssassin
- Port - The SpamAssassin port on the server running SpamAssassin (783 by default)
- Multithreaded - If the server you have installed SpamAssassin on is a Linux machine it is recommended that you check this. If it is running on a Windows machine you cannot have this selected.

Additional Topics

Automating Login to SmarterMail

The HTML code below demonstrates how you can make a text link (e.g. "Log into your mail") that automatically logs a user in to the SmarterMail application. By putting a hidden form on a simple web page, you can fill in the "Email Address", and "Password" information either via hard coding the data or through a scripting language like ASP, ASP.Net, or ColdFusion.

For the example code listed below, we have the form values set to generic text (e.g. "Actual_Email_Address_Here") to show where you would hard code values that are submitted to the login.aspx page. You could also dynamically generate these values using a scripting language like ASP or ColdFusion (a sample ASP script would substitute value="Actual_Email_Address_Here" with value=<% =email %>). The form action shown (<http://127.0.0.1:9998/smartermail/login.aspx>) uses the default location of the Smartermail Web Interface. If you have created a separate web site for Smartermail, or assign a different IP address for Smartermail within IIS, this action would have to be

altered to reflect this change. This example demonstrates how easy and powerful the Smartermail application is in allowing companies to automate entry into the mail application.

```
<html>
```

```
<head> <meta http-equiv= "Content-Language" content= "en-us" > <meta http-equiv= "Content-Type" content= "text/html; charset=windows-1252 "> <title>Smartermail Login</title> </head>
```

```
<SCRIPT LANGUAGE= "JavaScript" > function GoToMail() { document.mailform.submit(); } </SCRIPT>
```

```
<body>
```

```
<form name= "mailform" action= "http://127.0.0.1:9998/Login.aspx" method= "post" > <input type= "hidden" name= "shortcutLink" value= "autologin" id= "shortcutLink" > <input type= "hidden" name= "email" id= "email" value= "Actual_Email_Address_Here" > <input type= "hidden" name= "password" id= "password" value= "Actual_Password_Here" > </form>
```

```
<p><a href= "JavaScript:GoToMail()" > Log into your mail </a></p>
```

```
</body>
```

```
</html>
```

Gateways and Other Server Roles

Please note that SmarterMail was designed to support one server in several of these roles. For instance, one server could act as an Incoming Gateway, Outgoing Gateway, or Backup MX.

SmarterMail can also take on one of these roles when placed together with a competing mail server product. For example, using SmarterMail as an outgoing gateway on a server other than your primary mail server may help to resolve problems with stability of other mail server software products.

Primary mail server

- Use for storing email for defined users.
- Accessible through POP, SMTP, IMAP, and over the web.
- To configure:
- Follow instructions in online help

Backup MX Server

- Use as a backup for mail delivery in case of short amounts of downtime or delivery problems on your primary mail server.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

Incoming Gateway server

The FREE, one-domain version will suffice for virtually all environments.

- Use to host third party anti-virus and/or anti-spam software products in order to reduce load on primary server.
- Reduces load on primary server by managing all incoming sessions and performing abuse/intrusion detection.
- To configure:
- Enable domain forwarding and add all destination IPs and domain names that will be forwarded.
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- In DNS, change the MX records of your domains to reference the new gateway server.
- Install and configure any third-party anti-virus or anti-spam products, such as Declude JunkMail or Declude Virus.

Outgoing Gateway server

The FREE, one-domain version will suffice for virtually all environments.

- Use as a delivery mechanism to reduce load on your primary servers.
- Also use as a method to combat blacklisting. If the server gets blacklisted, rotate the primary

IP on the network card to a different one to send out on the new IP.

- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

SmartGateway server

The FREE, one-domain version will suffice for virtually all environments.

- Use as a delivery mechanism to balance the load on your gateway servers.
- To configure:
- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Set relay option in General Settings to "nobody".
- Add the primary mail server's IP addresses to the IP Whitelist for SMTP.
- In your primary mail server's General Settings page, set the IP address of the gateway server and enable gatewaying.

Backup MX Servers

A Backup MX Server is a mail server that will store (spool) your incoming email if your primary mail server becomes unavailable. A mail server can become unavailable to receive incoming mail for a number of reasons. For example:

- Hardware or software failure
- Very busy and unable to receive new incoming connections, or emails
- Network connection is down or saturated
- Network routing issues can also cause your mail server to become unavailable

Case 1 - No Backup MX

If you do not have a Backup MX Server, the following conditions may occur:

- Email will be bounced (Returned to Sender).
- Your (inbound) email will cause a backup in the originating mail server's spool.
- Service Timeout. Depending on the Retry attempts by the originating mail server, your mailboxes may never receive their incoming email.
- Users do not understand bounce messages. To most users, bounce messages are unreadable, so when they can't send an email, they do not try to resend.

Case 2 - With a Backup MX

How Email works when a Backup MX Server is involved:

- User sends an email to 'user@example.com' (a mailbox hosted by your SmarterMail Server)
- Their mail server looks up the MX Records for 'example.com' and finds two:
 - IP: x.x.x.x Weight: 10
 - IP: y.y.y.y Weight: 20
- Their mail server first attempts to connect to: x.x.x.x
- Connection fails, which could be caused by any of the above conditions
- They try to connect to the secondary MX record: y.y.y.y
- They successfully connect to this server.
- Email transmission begins, and the Backup MX Server receives the email into its spool.
- Since there are no existing local domains on this server, SmarterMail stores this email in its spool.
- Based off of the Retry Attempts, SmarterMail will continue to try and make connections to your Primary Mail Server.
 - SmarterMail will only make 4 retry attempts. It is recommended that you set the last attempt to a longer timeframe, i.e., 24 hours (1440 minutes)
 - This way SmarterMail does not send a Bounce Message to the originator saying that it could not deliver the message, before your Primary Server is back online.
 - If your Primary Mail Server comes back online before the final Retry Attempt, you can reset the Retry Counts on all messages in the spool. This will force the Backup MX Server to try forwarding all existing mail in the spool back to your Primary Mail Server.

Configuring a Backup MX Server

- Add a placeholder domain (called "example.com") to open up the port to listen on.
- Configure SmartHosting by adding the IP addresses to which delivery should be allowed.
- In general settings, change the delivery retry times to 10, 10, 10, and 1440.
- In DNS, add secondary MX records pointing to the new server's IP. Set the preference value higher than the main MX record.

Locking Down Your Server

Security is an ever-growing concern to business small and large. Because email servers are constantly under attack, SmarterMail has many features built into it to protect you. This topic explains steps you can take to protect yourself, your users, and your investment.

What is Security for a Mail Server?

The word security has many meanings. SmarterTools' opinion is that mail server security is comprised of several types of protection:

- Protecting your data
- Protecting your users
- Protecting your service availability
- Protecting others on the internet

Below are some "Best Practices" for maintaining a locked-down server, one that can withstand the constant abuse that mail servers are subject to.

- Update SmarterMail regularly
- Disable catch-all accounts
- Restrict bounces and auto-responders
- Require SMTP authentication
- Encourage the adoption of SPF

Update SmarterMail Regularly

SmarterTools is constantly working to improve SmarterMail and make it even more resistant to attacks. It is recommended that you keep your copy of SmarterMail up to date in order to stay protected.

To receive notifications of every update that SmarterTools releases for SmarterMail, go to the SmarterTools Customer Portal , login, select Account Management, then select Mailing Lists, and choose the "Updates.SmarterMail" subscription. Whenever a new update for SmarterMail is released, an email is sent to that mailing list. The list is not used for any other purpose.

Disable Catch-All Accounts

Catch-all accounts were popular in the past because of the flexibility they offer to a domain administrator. All an administrator had to do was add a catch-all account, and any mail that was mis-delivered would drop right into his mailbox. When catch-alls were most popular, spamming methods were not as sophisticated, and email harvesting attacks were not so prevalent.

Today, however, mail servers get attacked every minute of every day. Spammers assault email domains with thousands of spam messages sent to different email accounts in the hope that they will strike a hit to verify that the email account exists and to deliver another spam email.

In addition, if the catch-all user has an auto-responder enabled, the problem can be doubly harmful. Spammers rarely use their real email address, so if your user auto-responds to each of the thousands of messages above, and they happen to go to a large email provider, you will likely end up getting blacklisted as a spammer yourself.

As you can see, allowing the use of catch-all accounts exposes you to many types of abuse. SmarterMail allows catch-alls because it is expected in a mail server, but to lock down your server, we recommend the following procedure that will disable catch-alls:

- Alert your users that catch-alls are being disabled.
- Go to the General Settings page under the Settings menu.
- Click on the Security tab.
- Change Catch-Alls to Disabled.
- Click on Save icon.

Restrict Bounces and Auto-Responders

Email Bouncing occurs when delivery failures occur or a mailbox is full. A brief explanation of the error is sent back to the original sender of the message. Before spam became such a problem, this was usually not an issue. Today, however, spammers will sometimes spoof known spam trap accounts at places like SpamCop as the sender of the message. Thus, when your mail server bounces the message, the bounce ends up in the spam trap. Enough of these, and you'll be blacklisted.

The exact same is true for auto-responders that reply back to spoofed spam email.

SmarterMail allows you to restrict bounces and auto-responders to only those accounts that pass SPF checks, or to disable them entirely. SPF verifies that an email is not spoofed, and most of the serious spam trap accounts out there have SPF set up. To require SPF for bounces and auto-responders, do the following:

- Alert your users of the new policies being put into place.
- Go to the General Settings page under the Settings menu.
- Click on the Security tab.
- Change Auto-Responders to either Disabled or Require SPF.
- Change Bouncing to either Disabled or Require SPF.
- Click on Save icon.

Require SMTP Authentication

SMTP Authentication is an unspoken requirement of domains on modern mail servers. Any domain that does not have Authentication enabled is at a serious risk of being a relay for spam. Spammers will

try thousands of email accounts until they find one to send through, and if Authentication is not enabled, they will be able to use up your bandwidth and system resources to send mail.

Enabling SMTP Authentication ensures that users must supply credentials to send email from your server. This requires a change in their email clients so that the account information gets passed in SMTP, so there is often a bit of a learning curve. This process is necessary and important to protect your server, however, and without you are open for abuse.

To require SMTP Authentication for a domain, do the following:

- Alert your users of the change they will need to make to their email client. Due to the nature of this change, it is wise to give them a fair amount of warning.
- Go to Manage Domains.
- Click on the Actions menu next to the domain and choose Edit Domain.
- Go to the Technical tab.
- Check the Require SMTP Authentication box.
- Click on Save icon.

It is also recommended that you update this setting in Default Domain Settings so that all new domains will require SMTP Authentication.

To apply this setting to all domains on your server at once, use the Default Domain Settings Propagation page in the Settings menu.

Encourage the Adoption of SPF

SPF is an excellent method of preventing email spoofing, protecting your users from having their domain show up on spam throughout the world. SPF, however, is only as effective as you make it, as it requires changes to your DNS servers for each domain you host email for.

It is in the best interest of all email users everywhere that domain administrators add SPF records to their domain that indicate what servers are authorized to send email for their domain. Encouraging your domain administrators to adopt SPF protects them from being the victims of spoofing, and reduces the spam threat on not only your server, but others throughout the world as well.

More information can be found at: <http://www.openspf.org/>

Proper DNS Settings for Email

There are several major things to set up on your DNS server for each site you add to SmarterMail. How you set these up is dependent upon both who hosts your DNS and what DNS software is used. Check your DNS server documentation for instructions on how to set up the following records (replace example.com with the proper domain name).

Also, please bear in mind that your DNS may need to be set up differently. This is only a guideline that is recommended for most installations.

- WebMail URL - Add an A or CNAME record for mail.example.com that points to the IP address of the webmail interface. This will allow users of that domain to access the webmail by typing in <http://mail.example.com> or <http://mail.example.com:9998> in their web browser (depending on whether you use the included web server or IIS).
- Mail Pointer (MX) - Add an MX record for the domain that points to mail.example.com. This will allow other email servers to locate your mail server.
- Reverse DNS Record - Add a reverse DNS record for IP addresses assigned on the server to provide extra assurance to other mail servers. Also, it is recommended that the primary IP address of the server also have a reverse DNS record.
- Sender Policy Framework - Some large email providers like Hotmail and AOL are starting to require specially formatted TXT records to be added to your DNS. This special format is known as SPF (Sender Policy Framework). Information about how these records should be formatted can be found at <http://spf.pobox.com> . Please keep in mind that the owners of the domains may have significant input on what goes into these records.

Changing the System Administrator Login

By default, the login for the system administrator for SmarterMail is admin/admin . While this is easy to remember, it is also fairly easy to guess. When installing SmarterMail for the first time, you will be required to change this password during the setup wizard. Here are instructions in the manner you would want to change the system administrator password again.

Instructions

- Log in as the administrator with the current login.
- Click the Settings icon.
- Choose General Settings in the left tree view.
- Click on the Administrator tab.
- Enter the current password for verification.
- Enter a new username and password (avoid using an email address for the username).
- Click on Save icon.

Resetting an Unknown Login

For instructions on how to reset an administrator login when the current login is unknown, please see the KB article on [Resetting an Administrator Login](#) .

Troubleshooting a Domain

There are times when you will need to access domain specific information. SmarterMail uses impersonation to accomplish this goal, causing a separate window to log in automatically as the domain administrator. This can be a useful method to examine domain settings or configure settings.

To impersonate a domain, click the Manage button on the main toolbar and then click the Impersonate icon on the actions toolbar. A new window will pop up, and you will be logged in as the Domain Administrator. From there, you may edit user accounts, content filters, or whatever other part of the domain that needs to be changed.

For instructions on troubleshooting specific user accounts on a domain, please see the topic [Troubleshooting an Email Account](#) .

Modifying Scoring for the SpamAssassin-based Pattern Matching Engine

System administrators can modify the scoring for the SpamAssassin-based pattern matching engine using the local.cf file. However, this feature is only recommended for experienced system administrators.

The local.cf file is placed in the service's SData folder. It is used to override existing tests or to create new tests supported by SmarterMail. Note: Any modifications to the local.cf file will not be overwritten when installing a new version.

Overriding an Existing Test's Score

The most common modification to the local.cf file will be to override an existing test's score. For example, if a system administrator he notices a lot of spam messages getting into his users' mailboxes that are failing a particular test, he may want to override a that test's score.

To do so, the server administrator would add something like:

```
score TEST_I_WANT_TO_OVERRIDE 1.3
```

Here score is the keyword used by the engine, TEST_I_WANT_TO_OVERRIDE corresponds to the existing test they want to override and 1.3 is the new score.

Creating a New Test

If a system administrator notices a noticed a new pattern appearing in spam messages that isn't covered by the default files, he may want to create a new test. This would look something like this:

body NEW_TEST /test/ #look for the word test in the body of the email score NEW_TEST 10.3

Here body is the keyword for determining the type of test, NEW_TEST is the name of the new test, /test/ is the perl style regular expression that will be used while scanning the email, and everything after the pound-sign is a comment.

The system administrator will also need to score the new rule so that it has some affect on the final weight.

Glossary

Below is an alphabetized list of the various terms and phrases used in the SmarterMail Product.

SMARTERTOOLS END USER LICENSE AGREEMENT

SmarterTools, Inc. Software License Terms

This End User License Agreement ("EULA") is between SmarterTools, Inc. ("SmarterTools") and the License holder ("You") of the software product this EULA accompanies ("Software"). It is important to read and understand all of the terms, limitations, and conditions contained in this EULA prior to installing and using the Software because they affect how You may use the Software and Your rights under this License. By explicitly accepting this EULA, or by installing, copying, downloading, accessing, or otherwise using the Software, You agree to be bound by the terms of this EULA. If, prior to using or installing the Software, You decide that You are unable or unwilling to agree to the terms of this EULA, promptly and completely uninstall and destroy any electronic copies of the Software and accompanying items in your possession.

This EULA shall apply to:

- * This Software
- * Future Versions of this Software
- * Updates, add-ons, and plug-ins to this Software, as may be made available by SmarterTools from time to time, including but not limited to language packs, dictionaries, and skins (collectively "Updates")
- * Features selection(s), including, but not limited to, "Professional," "Enterprise", and "Free" editions of the Software, and maximum allowed numbers of users, profiles, devices, email addresses domains, web sites, or agents ("level");
- * Services, support, advice, and recommendations related to this Software that may be made available by SmarterTools on the Internet, in the Software documentation, or by telephone

* Any and all Technical Support Services offered in connection with the Software

DEFINITIONS

The following definitions shall apply for the purposes of this EULA:

* "Dedicated Hosting" shall refer to an individual, group, or organization ("Dedicated Host") that maintains a physical server device that is wholly or, in the case of Virtual Private Servers ("VPS"), a dedicated portion of a physical server device that is sold, leased, or otherwise made available to a third party; whether or not a fee or other compensation is exchanged; and in which the third party has authorization and/or access to the activation areas of the software and/or to system administration functions.

* "Effective Date" shall be the date upon which this EULA was accepted by You.

* "Elastic Computing" shall refer to a user's ability to install software, create websites or instantiate a database on one or more Workers that can then be given incremental CPU cycles or percentages, memory (RAM) allocations, and/or physical disk space and bandwidth allocations that can all, then, be managed (increased or decreased) separately and on an as needed basis.

* "Failover" is the ability of a system to automatically switch to a second, standby system should the primary system fail or is temporarily shut down.

* "License" shall refer to the revocable, non-exclusive, non-transferable license to use the Software ("License") in accordance with the terms and conditions of this EULA. The term License applies to purchased and non-purchased Licenses, including but not limited to the object code, source code, and any accompanying alphanumeric combinations used to enable and/or activate the software or certain Features Selection(s) in the Software (collectively, "License Keys").

* "License Key" shall apply to the alphanumeric combination entered/applied upon installation and used to access Feature Selections. License Keys are delivered to the owners of purchased (paid for) Licenses and to those who may receive authorized promotional or trial Licenses, if applicable (pursuant to this EULA). SmarterTools may create and provide certain Levels, Editions, and/or Versions of the Software that do not require entry or use of a License Key for promotional or other purposes. This EULA remains in full force and effect whether or not a License Key is required or provided by SmarterTools.

* "Load Balancing" is a networking methodology whereby processing and workload is distributed evenly among a group of independent machines (e.g., servers) so that no single device is overwhelmed and so that there is no single point of failure.

"Multi-tenancy" and "Multi-tenant license(s)" shall refer to the ability of any single license to support multiple separate and unique client organizations, particularly when offering a single license in a Software as a Service (SaaS) capacity. For the purposes of this EULA, only SmarterStats and SmarterMail are multi-tenant licenses.

* "Periodic License" shall be a License with a defined temporal component (start and end date) whether or not such License is subject to renewal, automatically renews, effectively terminates, or is extended (e.g., Monthly/Lease Licenses, Trial Licenses, Development Licenses). Periodic Licenses may be governed by additional terms and conditions in a separate written agreement.

* "Third Party Providers" shall be any other software, application, plug-in, add-on, utility, tool, device, or methodology by any individual, group, organization, affiliation, company, or other entity that connects, modifies, links, and/or integrates to/with the Software for any purpose whatsoever.

* "Shared Hosting" shall refer to an individual, group, or organization ("Shared Host") that maintains a physical server device upon which software and/or tools are owned and installed by the Shared Host and made available to third parties for access or use; whether or not a fee or other compensation is exchanged; and in which the third parties do not have authorization or access to the activation areas of the Software and/or do not have authorization or access to system administration functions.

* "Worker(s)" shall be the location where software, websites or databases are installed in an Elastic Computing environment. A Worker can then have CPU cycles, disk space and RAM allocations and bandwidth modified (i.e., increased or decreased) on an as needed basis to accommodate shifts in traffic and usage. Also known as a worker process.

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