



# Settings

Help Documentation

## 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 Chart 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 of 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 to 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 sent 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 sent 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.