



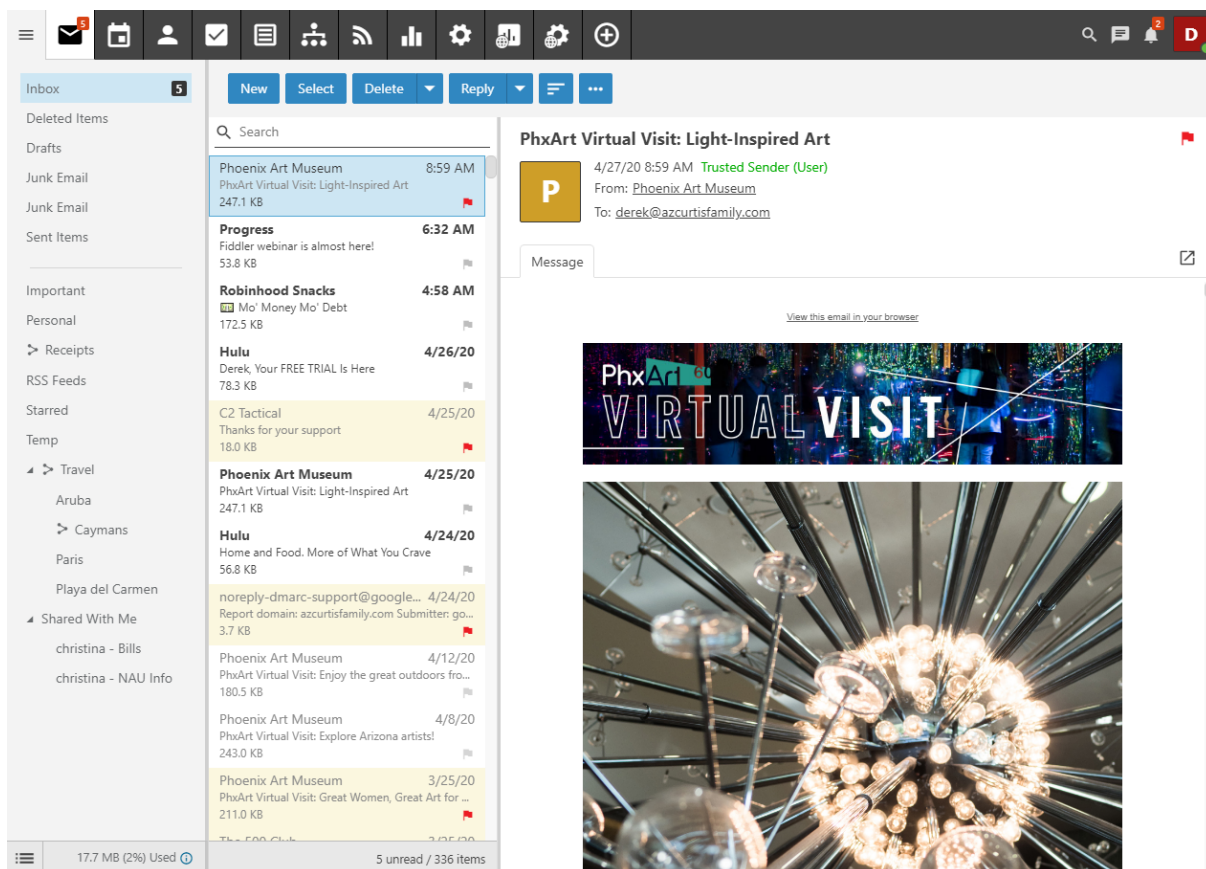
# Email

Help Documentation

# Email

## Email Overview

SmarterMail users can send and receive email messages, view their calendars and create appointments, create or review tasks and more, from anywhere in the world, using any computer or mobile device and a simple web browser. In addition, SmarterMail is fully compatible with any desktop email client such as Microsoft Outlook or Apple Mail, or mobile email, contacts and calendar apps on Android and iOS. To login to SmarterMail simply use the link to the webmail interface login page provided by whoever set up your SmarterMail mailbox. Once on the login page, type your full email address and password in the appropriate fields and click Login .



## Navigating Email

When you go to the Email section of SmarterMail you'll generally start with your Inbox as it's the primary location all new email resides. While you can have content filters set up that route email to different folders or locations, your Inbox is, by default, the starting point for anyone using webmail. Once here, you'll see that the interface is separated into various sections.

### **3 Bar Icon**

At the top of the folders view you'll see the 3 Bar icon. This allows you to hide or show folders, which is extremely beneficial when viewing your Inbox on smaller devices, such as tablets and phones.

### **Default and Custom Folders View**

The left side of the interface displays your folders. Here, you'll see the default folders listed at the top: Inbox, Deleted Items, Drafts, Junk Email, and Sent Items. These folders are created for every mailbox within SmarterMail.

Below the Default Folders are the Custom Folders that a user creates. If additional folders are embedded within a main parent folder, a down arrow is displayed to the left of that folder's name. Clicking the down arrow will expand that folder and display the additional, embedded folder names. Clicking it again will hide those embedded folders.

At the bottom of the All Folders list is the Shared With Me area. Here you'll be able to see any folders other users have shared with you. As for your own shared folders, these are denoted by a sideways V shape to the left of the folder. Folders shared with you are always displayed in the Shared With Me area, while folders YOU share remain in their natural order -- they simply have a sharing symbol next to them.

Read more about [Managing Folders in SmarterMail](#).

### **Messages View**

To the right of your Default and Custom Folders is the Messages view. Here, you'll see a list of all of the messages in your inbox or that reside in whichever Default or Custom Folder you're currently in.

At the top of the All Messages view are Email Interaction buttons:

- New
- Select
- Delete
- Reply
- Sorting
- Actions

Read more about [Reading Email Messages](#) , [Composing Email Messages](#) and [Deleting Email Messages](#) in SmarterMail.

## **Email Interactions**

There are a number of different ways to interact with messages in SmarterMail. Buttons such as New are fairly self-explanatory, but others have multiple different options. Moving from left to right, these buttons are:

- **Select** - By itself, the Select button allows you to select one or more messages in your messages list. When clicked, you can scroll through your messages and select individual ones as needed, then delete those selected messages, move them, etc.. Alternatively, holding the Ctrl key (on Windows) or the Command key (on Mac OS) also allows you to select individual messages. Using the Shift key allows you to select multiple concurrent messages at a time. Clicking the caret (down arrow) next to the Select button gives you the following options:
  - **Select All** - Selects all messages in the All Messages view.
  - **Deselect All** - If any or all messages are selected in the All Messages view, this unselects them.
  - **Delete** - Moves the selected message(s) to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) . Clicking the caret (down arrow) next to the Delete button gives the following options for the message(s) selected:
    - **Undelete** - Retrieves deleted messages from your Deleted Items folder provided the system hasn't been purged yet. Note: After the system purges any items marked for deletion, you can't retrieve the deleted messages. In addition, Undelete is only available for messages Marked as Deleted or messages in the Deleted Items folder.
    - **Delete All in Folder** - Moves all of the messages within a selected folder to the Deleted Items folder. This option takes the same action as delete, except that it will perform the delete operation on every email in the folder, regardless of whether the message is checked or not. This option is most useful in folders like Junk Email or Deleted Items.
  - **Reply** - There are three (3) options when replying to a message:
    - **Reply** - Selecting Reply means you will reply to the the sender only.
    - **Reply All** - Selecting Reply All addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
    - **Forward** - Selecting Forward allows you to send the message to someone other than someone in the To and Cc fields. NOTE: It is also possible to add email addresses to the To and Cc fields when you Reply or Reply All to a message.
  - **Sort** - See the section, below, for more details about sorting.

- **Actions (...)** - This button doesn't do anything by itself, but once selected, you have the following actions:
  - **Move** - Moves the selected message(s) to any available folder. Note: You can also drag-and-drop messages to an available folder.
  - **Add Task** - Allows you to add a Task that is associated with that message. This is a good way to keep task details aligned with the message that initiated the task in the first place.
  - **Print** - Brings up the Print dialog on your desktop or device.
  - **Mark Read** - Marks the selected message(s) as read and changes the status indicator appropriately.
  - **Mark Unread** - Marks the selected message(s) as unread and changes the status indicator appropriately. This can be useful for reviewing messages at a later time.
  - **Flag** - Marks the selected message(s) for follow-up and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next the message to mark it for follow-up.
  - **Unflag** - Removes the follow-up on the select message and changes the color of the follow-up flag appropriately. Alternatively, users can click on the flag icon next to a message marked for follow-up to remove the follow-up flag.
  - **Trust Sender** - Adds the address to your Trusted Senders list, meaning any future emails from this address will bypass most antispam options enbaled for the server. (NOTE: SPF and DKIM still run against any address in the Trusted Senders list to prevent phishing.)
  - **Block Sender** - Prevents the sender of the selected message(s) from sending any more messages to the account. When you block a sender, a new Internal Blocked Senders Content Filter is created. Any user you block is added to that list, and their email is, by default, deleted.
  - **Unblock Sender** - Allows the sender of the selected message(s) to begin sending messages to the account again by removing the address from the Internal Blocked Senders content filter.
  - **Create Filter** - This options opens the Content Filtering area. Here, you can use information contained within the email message, such as the From Address, Subject, etc. and create a new Content Filter based off that information.
  - **Add Sender to Filter** - This option opens a modal window that lists all of your existing Content Filters. You simply select the filter you want this sender added to, and they're immediately added.
  - **View HTML** - Allows you to view the original message in its rich, HTML-formatted state.
  - **View Text** - Removes any HTML formatting and displays the message a "text only."
  - **View Raw Content** - Allows you to view the message in its raw, unformatted state and includes the header of the message. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.

- View Header - Only displays the message's header information, which includes items such as the message ID, the message's content type, etc.

### **Disposable Address**

A Disposable Address is a randomly generated address, completely independent of a user's current email address. This address acts as a timed alias, forwarding mail to a parent folder for however long specified. When the time limit has been reached, the address is no longer valid and mail will not reach the mailbox. This is useful when you only need a temporary sign up or don't want to give out your email address and possibly get inundated with spam messages.

#### **Creating a Disposable Address**

You can create a Disposable Address using the menu option at the bottom of the navigation pane or by right-clicking on the folder itself. When you create the address, SmarterMail will automatically create the username, but you have the ability to select the folder where the messages to that address are delivered, plus the length of time you want to use the address. At any time you can either extend that timeframe or disable the address entirely. Simply open the Disposable Address option to make modifications. NOTE: Only one Disposable Address can be used at any one time.

### **Sorting Messages**

To sort messages, click on the Sorting icon and select the field, or fields, you want to use for the sort order for your messages. For example, clicking the Sorting icon and selecting "Size" will sort items in order of their size. (This includes the size of a message plus attachments.) To change the "direction" of the sort, either Ascending or Descending, select that option from the Sorting icon menu as well.

You can get a more granular sorting of messages by selecting their status: All, Unread, Replied To, etc.

In general, the following options are available in the Sorting menu:

- Date - The date and/or time the mail system received the email.
- From - The sender of the email message.
- Subject - The subject of the email message.
- Size - The size of the email in kilobytes.
- Sort Order - Either Descending or Ascending. For example, if you sort messages by Size, Descending order would be from largest message to smallest; Ascending would be smallest to largest.
- All - Will sort All messages.
- Unread - Will sort using all Unread messages as the sort method.
- Read - Will sort using emails that have been read as the sort method.

- Replied To - Will sort using all emails that have been replied to as the sort method.
- Not Replied To - Will sort using all emails that have no replies as the sort method.
- Flagged - Will use emails that are marked for follow up as the sort method.
- Linked to Tasks - Will use emails that are associated with Tasks as the sort method.
- Attachments - Will use emails that have attachments as the sort method.

## Reading Email Messages

SmarterMail displays whether you have unread email in your inbox, or in any folders -- even shared folders -- a number of different ways. Note: The first three notification types are demonstrated in the diagram on the Email Overview page .

- The number displays in the Email icon.
- The number displays next to its folder. (E.g., Inbox)
- A number appears in the browser tab, surrounded by parentheses.
- Unread messages display as bold in the All Messages view.
- A new message notification, also known as a "toast notification," will temporarily display in the webmail interface.

To view the contents of a message, simply click the desired message and it will open in the Preview Pane. You can also double-click the message and it will open in a separate pop-up window. If you do NOT have a Preview Pane showing under or to the side of your messages list, double clicking the message is the only way to open it and read its contents.

### Single Message Actions

In general, the following options are available when viewing a message, either within the webmail interface or when it's been popped out into a separate window:

- Delete - Selecting the Delete button will move the message to the Deleted Items folder. Note: This is the default action taken when a message is deleted. Depending on your account settings, the delete action may be different. For more information, see [Deleting Email Messages](#) .
- Reply to a message - There are three (3) options when replying to a message:
  - Reply - Selecting Reply means you will reply to the the sender only.
  - Reply All - Selecting Reply All addresses a response to the sender and everyone else who received the message. This includes all email addresses listed in the To and Cc fields, except your own email address.
  - Forward - Selecting Forward allows you to send the message to someone other than someone in the To and Cc fields. NOTE: It is also possible to add email addresses to the To and Cc fields when you Reply or Reply All to a message.

There are also several Actions that are available for any single message. These generally include:

- **Move** - Allows you to Move the Message to a Folder. When you select Move, you are prompted to select a Folder where you want the Message to be placed. Alternatively, you can select the message from the All Messages view and drag it to the folder of your choice.
- **Add Task** - Creates a new Task and links it to the message. For more information, see [Linking to Email Tasks](#) .
- **Print** - Prints the message.
- **Mark Read** - Marks the message as Read.
- **Mark Unread** - Leaves the message in an unread status.
- **Flag** - Marks the message for follow up.
- **Unflag** - Removes the follow up from a message.
- **Mark Spam** - Marks the message as spam and moves it to the Deleted Items folder.
- **Mark Not Spam** - Marks the message as not spam and automatically adds the email address to your trusted senders list. This Action only appears for messages in the Junk Email folder.
- **Trust Sender** - Adds the address to your Trusted Senders list, meaning any future emails from this address will bypass most antispam options enabled for the server. (NOTE: SPF and DKIM still run against any address in the Trusted Senders list to prevent phishing.)
- **Block Sender** - Prevents the sender of the selected message(s) from sending any more messages to the account.
- **Unblock Sender** - Removes the sender's email address from your Blocked Senders list.
- **View Text** - Removes any HTML formatting and displays the message as "text only."
- **View Raw Content** - Allows you to view the message in its raw, unformatted state and includes the header of the message. Viewing the raw content or just the header can assist with diagnosing potential issues with viewing the message.
- **View Header** - Only displays the message's header information, which includes items such as the message ID, the message's content type, etc.

## Viewing Remote Content

Remote content is considered to be any image, video, animated gif, etc. that has an external source and is contained in an email. When remote content is included in an email, that content is hidden by default and must be manually displayed. Clicking on Show will display the remote content for that specific email. Once this has been done, the remote content will be displayed on that email going forward. Clicking on Always show images from [email] will add an exception for that email address to the Remote Content Exceptions list, which is found in your Account Settings. When an exception has been made for an email address, emails from that sender will display all remote content automatically.



Note: Emails from Trusted Domains and Trusted Senders will always display remote content automatically.

To allow remote content to be automatically displayed from all senders and sources, enable the Show images from external websites setting in your Account Settings.

## Downloading Email Attachments

If a message has any attachments, a paperclip will display in the Messages List for that message. In addition, an attachments tab will display under the message header in the preview pane. SmarterMail displays the file name of the attachment as well as its file size. It also displays, where possible, a preview of the attachment as an icon. Generally, this will only happen when an attachment is an image file. Other file types will display a more generic icon. Attachments are downloaded individually by simply clicking on the attachment. However, it is also possible to download all attachments in one convenient ZIP file.

## Composing Email Messages

It's very easy to create new messages in SmarterMail as well as reply to existing messages or forward messages on to other individuals or groups. Below you'll find a brief walkthrough of each scenario.

### Creating a New Message

To create a new message, click the New button at the top of the All Messages view. This will pop-out the new message compose window. Having a pop-out allows you to reference other areas of SmarterMail or easily navigate to other browser tabs if you're using other websites for information to include in your new message.

The following fields will appear in the header of the message you're creating:

- **Send From** - If you have more than one SMTP Account set up, or if one or more Domain Aliases is set up, you have the ability to select the email address from which the message will be sent. Otherwise, this field will not be displayed as the message is sent from the one account you have set up.
- **Signature** - If you have more than one Signature set up, or if the Domain Administrator has set up a default signature for you, you have the ability to select the signature used for the message. Note: If the domain administrator has disabled the ability to override domain-level signatures, you will not be able to choose an alternative signature.
- **To** - Type the email address for each primary recipient you want to receive your email. Multiple addresses can be used, simply separate each with a comma or semi-colon. When entering addresses into the To, Cc, and Bcc fields, SmarterMail will auto-complete addresses by

referencing your contacts list, mailing lists, your Auto-complete list , aliases or the Global Address List.

- Cc - Carbon Copy (Cc) recipients are those who should be included as part of the conversation, but are not necessarily primary recipients.
- Bcc - Blind Carbon Copy (Bcc) recipients are hidden from those people listed in the To and Cc fields. In addition, in a Reply All scenario, Bcc users do NOT receive a copy of the reply. For this reason, it is common practice to use the Bcc field when addressing a very long list of recipients or a list of recipients that should not (necessarily) know each other.
- Subject - Type a descriptive subject or title of the email.

Below the Subject line is a complete HTML editor that you can use to write and format your message. A number of formatting options are available, from selecting a font color to inserting multimedia elements to a message.

### **Email Actions**

The following actions are available for a new message:

- Send - Sends your message to the designated recipients.
- Cancel - Cancels your message. However, SmarterMail has an auto-save setting, so it's possible that a draft of your message will be saved automatically. If this happens, you'll see a number appear next to your Drafts folder. Clicking Cancel will display a window asking whether you want to save a draft of the message.
- Save Draft - Saves the message in its current state to the Drafts folder without actually sending it. This is useful if you need to continue writing the message at a later time. Note: By default, SmarterMail has an auto-save frequency of 2 minutes.
- Attach - Allows you to attach one or more files to the message. See below for more information.
- Actions dropdown:
  - Message Priority - Set to High, Normal or Low. Specifies the importance of the message. By default, messages have a normal level of priority.
  - Request Read Receipt - Sends an email confirmation back to the sender when the recipient opens the message.
  - Request Delivery Receipt - Sends an email confirmation back to the sender when the message is successfully delivered to the recipient.
  - Flag - Marks the message for follow-up. For more information, see Marking Email for Follow-ups .
  - Link File - Uses SmarterMail's File Storage feature to insert a link to a file saved on the mail server or to a file located in a connected file storage account , such as Dropbox or OneDrive.

Either way, the links can be sent to recipients who can then download the linked file(s). Note: Linking to a private file in File Storage will enable public access on that file with no set expiration date.

### **Attaching Files**

In addition to using the Attach button when composing a message, you have the ability to drag-and-drop files to be attached to your message. When files are attached to an outgoing message, a file manager will display at the bottom of the new message window. The file manager will display the name, size, and upload status of the file. Attachments must reach an upload status of 100% before the item is actually attached to the message. Note: To remove an attached file prior to sending the message, just click the X in the top, right corner of the file.

To display an image within your message body, use the Insert Image button from the toolbar editor.

## **Replying to Email Messages**

SmarterMail gives users two options for replying to a message:

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

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

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

## **Forwarding Email Messages**

You may also want to simply forward a message to a third-party or to someone not already copied on the original message. This is very easy to do:

- Forward - Allows you to send the message to a third-party, or to an address that is not in the To or Cc fields.

Messages can be forwarded individually or in bulk. When forwarding multiple messages, the EML file of the email will be attached to a new compose window. SmarterMail automatically fills in the subject field with the subject from the original message preceded by "Fwd" (which means "Forward"), and the text box with the text from the original message. It is possible to edit any of these pre-filled fields, however, as needed. All other message options are the same as when composing a new message.

In addition, SmarterMail has an auto-forward option, which can be found in a user's Account Settings, that will forward a copy of all messages sent to a user's Inbox (as well as messages routed to other email folders via content filters or plus addressing).

## Forwarding Multiple Messages

On occasion, users may want to forward multiple messages to someone. Instead of forwarding each message individually, SmarterMail allows users to forward multiple messages at once and includes them as attachments to a single message.

Follow these steps to forward multiple emails at once:

- Log into SmarterMail as a user.
- Click the Email icon.
- In the navigation pane, click the folder containing the messages you wish to forward. The messages in the folder will load in the content pane.
- Select the desired messages. This can be done by selecting them individually, using the Sort button to look for messages with attachments, etc., it can be done by doing a search and then selecting all of the search results, etc.
- Click the arrow next to the Reply button.
- Select Forward in the drop down. (This should be the only Reply option available to you.) This will open a new message window that you will use to compose a message to the desired recipients. The messages that you wanted to forward will be attached as .eml files to the new message.
- Compose the message and click Send .

## Searching Email Messages

SmarterMail indexes all of the messages you receive, regardless of how you organize them in your folders. As long as the message hasn't been deleted and purged from your account, the search tool will find emails quickly and easily. SmarterMail also offers an Advanced Search feature that allows you to search across all of your folders in addition to adding search criteria such as To and From addresses, search strings and more.

To perform a search, first go to the folder you want to search in. This can be your Inbox, Sent Items, Drafts or any of the custom folders you create for organizing your messages. You can also search in shared folders. Next, type the search criteria in the search bar located near the top of the All Messages view. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the the messages within the folder you are viewing for matches and display the

results. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."

It's also possible to use the Sort options on messages that were returned by your search so you can sort for messages that have attachments, that were replied to, that are flagged, that are linked to tasks or more. While not technically a "search", being able to sort your messages using specific criteria can assist with finding the messages you need.

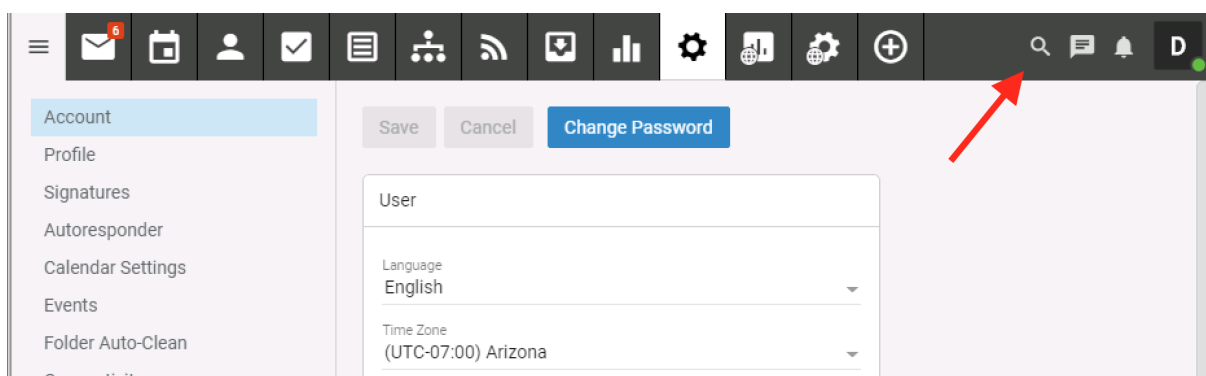
## Advanced Search Overview

SmarterMail users can take advantage of the mail server's powerful search feature to search ALL folders within their mailbox, including Deleted Items, Drafts and other default folders. In addition, Advanced Search is performed outside of the mail interface, so users can continue using SmarterMail while the search progresses as well as view results once it completes. Search results are displayed with complete details (date/time, folder, etc.) making it easy to find the information you are looking for.

Advanced Search differs from a standard search as it not only searches all folders but allows users to add criteria to their search parameters so that specific items are returned. This criteria includes search words or phrases, To and From addresses, timeframes and more.

## Performing Advanced Searches

To start an Advanced Search, click on the magnifying glass icon in the upper right corner of the interface.



Once Advanced Search is selected, a new modal window appears. Here, you select "where" you want to search: Everywhere, or within a specific area of SmarterMail. If you set Everywhere as your criteria, you simply enter your search string and SmarterMail will search throughout all areas. If you select a specific area to perform your search, you'll need to add search criteria.

Using the Add Criteria dropdown, you pick the criteria you want to use for your search. This includes:

- **Search String:** The words or phrases you want to search for. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."
- **From:** The address a message was sent FROM.
- **To:** The address a message was sent TO.
- **Cc:** The address a message was Carbon Copied TO.
- **Subject:** The complete or partial Subject of the message that was sent.
- **Folder:** The specific Folder to search. If left blank, all folders are searched.
- **After Date:** The Year and Month after which the message was sent. For example, if May 2012 is entered, only results AFTER May 31, 2012 will be returned.
- **Before Date:** The Year and Month before which the message was sent. For example, if January 2015 is entered, only results BEFORE January 1, 2015 will be returned.

Once all choices have been made, use the Search button to initiate the search. The search results display in a separate pop-out window, with results listed in order. It's then possible to click on individual messages and open them in their own pop-out windows. (Messages must be opened individually -- it's not possible to check the box next to multiple messages and have them all open at once.) You can also select a message and use the Open button. Finally, it's possible to delete one or more messages by checking the box next to the message and using the Delete button. Messages deleted from Advanced Search will use whatever default deletion behavior you have chosen for your account. (I.e., moved to the Deleted Items folder, marked as deleted or marked as deleted and hidden.)

## Deleting Email Messages

SmarterMail offers a few different methods for deleting messages:

- You can delete them using the Delete button in the webmail interface,
- You can right-click on the message(s) and select "Delete" from the context menu that appears,
- You can use the Delete key on your keyboard. (Not the Backspace key, but the Delete -- or Del -- key.)

The action SmarterMail takes when you delete a message depends on the option you choose for the Delete Action on the Webmail card in your Account Settings . These options include:

- **Move to Deleted Items Folder** - When items are deleted they are moved to the Deleted Items folder. If the Deleted Items folder does not exist, it will be created automatically the first time you delete a message.
  - **Permanently Delete** - This option will permanently purge the messages after deleting them.
- Note: When permanently deleting messages, 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. Once the **Purge Marked as Deleted** option is chosen from the **Delete** button dropdown in your inbox, all items marked for deletion will be permanently removed.

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

## Undeleting Messages

Didn't mean to delete a message? You can retrieve deleted messages from your Deleted Items folder as long as the system hasn't been purged yet. Just open the Deleted Items folder and select the desired message(s). Then, simply click the arrow next to the **Delete** button in the webmail interface and select **Undelete** from the dropdown. You can also right click on one of the selected messages and choose "Undelete" from the contextual menu that appears. Note: Your system administrator can permanently remove the messages in your Deleted Items folder at any time without warning, so don't delete messages if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted messages.

## Effects of Folder Auto-clean

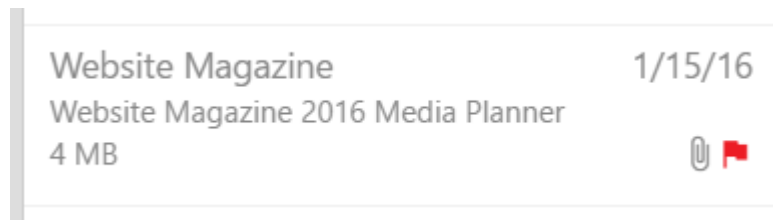
Your system administrator may have established auto-clean policies that may delete older junk email, deleted items, and/or sent items when these folders get too large. However, they may have left the option available for you to override auto-clean settings. For more information, see [Folder Auto-clean](#)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

## Flag Email for Follow-up

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

There are a few ways for users to flag a message. The first is to simply click on the flag icon at the far right side of the message list in the All Messages view. Secondly, users can select the desired message and click the **Actions** menu, then click **Flag** . You can also right-click on a message and select "Flag" from the context menu. Regardless of which method you choose, the flag icon will turn red and a the

message will also appear in the follow-up view, giving you easy access to all messages that require a further action.



It should be noted that the ability to flag messages in SmarterMail is primarily intended to help users easily identify messages that need follow-up. The functionality is supported through the IMAP protocol and some sync protocols, such as MAPI/EWS and EAS, so that flagged messages will sync with email clients like Outlook as well as email clients on mobile devices.

## Finding Flagged Messages

Although flags help messages stand out in a list, it may be difficult to find a specific flagged message if you have a lot of messages in your inbox. To quickly view all messages marked for follow-up, expand the Sorting menu in the All Messages view and select Flagged . Your messages will sort, placing the messages with Flags at the top of the list.



The screenshot shows an email client interface. At the top, there is a toolbar with buttons: "New", "Select", "Delete", a dropdown arrow, "Reply", another dropdown arrow, a list icon, and a three-dot menu icon. Below the toolbar is a search bar with a magnifying glass icon and the text "Search". The main area displays a list of emails. The first email is selected and highlighted in light blue. It has the subject "O Data Centers", a date of "2/9/17", and a snippet "How Can IO's Colocation Services Benefit You?". Below the snippet is "24 KB" and a small flag icon. The other emails in the list are: "Twitter" (2/9/17, "Follow Rihanna, LeBron James and Kevin Hart on ...", 42 KB), "Digital Summit Phoenix" (2/9/17, "Marketers: 20 things you'll learn at Digital Summit", 49 KB), "Digital Summit Phoenix" (2/9/17, "20 new things you'll learn at Digital Summit this y...", 51 KB), "Colin Cieloha" (2/9/17, "Found You On Linkedin Derek", 7 KB), "Newegg.com" (2/9/17, "12-Hr Site-Wide Coupon + Today's Sweet Laptop...", 51 KB), and "SmarterTools (No Reply)" (2/9/17). A context menu is open over the first email, showing options: "Date", "From", "Subject", "Size", "Descending" (checked), "Ascending", "All" (checked), "Unread", "Read", "Replied To", "Not Replied To", "Flagged" (highlighted), "Linked to Tasks", and "Attachments".

## Removing a Follow-up Flag

To unmark a message for follow-up, select the desired message and click the Actions menu in the Single Message view. Then click Unflag . The flag icon will turn white and the message will no longer appear in the follow-up view. You can also click on the flag icon or right-click the message and select "Unflag" from the context menu.

## Linking Email to Tasks

Email exchanges can often result in the need to create one or more tasks. For example, an email exchange with a vendor may require updates to price sheets or shipping requirements. Perhaps an

email from a significant other mentions an upcoming birthday or anniversary. Because of this, SmarterMail includes the ability to create a new task right from within an email message. This is called "linking" an email message to a task.

There are a couple of ways to add tasks to a message:

- First, you can open and view the desired message. From the Message view, click the Actions menu and then select Add Task .
- Another way is to select the message in the All Messages view, then right click on the message and select "Add Task" from the context menu.

Follow these steps to generate and link a task from an email message:

- Log into SmarterMail as a user.
- Click the Email icon.
- Go to your Inbox, or whichever folder contains the email message you wish to link to a task.
- Select the message.
- Click on the Actions (...) button.
- From the dropdown menu, select Add Task .
- A new window will pop out. In it, you can create the Task by filling out the pertinent details. Once you click Save , the task is created and automatically assigned to the email.
- On the email itself, a new Tab will appear, called Tasks. On that tab is a brief overview of the task that was associated to the message, including the task's title, start and due dates. Clicking on those details will pop out the task details.
- Once the task is saved, a new Tasks tab will display in the message indicating that you successfully linked the task to the email.

Regardless of which method you choose, a new task window will open where you create the actual task. Once the new task has been saved, a tasks card will display at the bottom of the message. Clicking on this card will allow you to see the task that is linked to the message. You can also go to the Tasks Section of SmarterMail to view all tasks.

## **Finding Messages with Linked Tasks**

To quickly view all messages that are linked to tasks, expand the Sorting menu in the All Messages view and select Linked to Tasks . Your messages will sort, placing the messages that are linked to tasks at the top of the list.

## Managing Email Folders

On first glance, SmarterMail users will notice that their mailbox has five special-purpose, permanent folders that can't be removed or renamed. These folders will reside at the top of the folders list as well as being listed with any other folders a user creates. These include:

- **Inbox** - All incoming messages automatically go to your Inbox folder. You can read your mail in the Inbox, then delete it, move it to another folder or leave it in the Inbox. When creating folders, it's not recommended to create them within the Inbox as many email clients, especially mobile clients, have difficulty syncing folders created within the Inbox. Note: If you have set up content filtering for your mailbox, incoming messages may bypass your Inbox per your content filtering settings.
- **Deleted Items** - When you delete messages, by default they're moved to the Deleted Items folder. (Just know that, this default action can change based on your settings - see [Deleting Email Messages](#) for more information). Messages in the Deleted Items folder can be deleted at any time without warning depending on any auto-clean settings your system administrator has in place, so it's best if you don't delete messages if you think you'll want them later. The Deleted Items folder is the default folder SmarterMail creates for deleted items. When migrating from other email systems to SmarterMail, the migration may create a different folder for deleted items based on what that email system uses as its default.
- **Drafts** - This folder holds messages that you've composed but haven't sent yet. A message saved in your Drafts folder stays there until you either send it or delete it.
- **Junk Email** - Messages SmarterMail believes to be junk mail bypass your inbox and go to the Junk Email folder. You should periodically check this folder to ensure that valid messages were not accidentally delivered to the Junk Email folder. If you find valid emails in your Junk Email folder, you can move them back to your Inbox by either dragging them to the Inbox or using the right-click context menu. If the sender is someone you know, you can also add them as a Trusted Sender using the right-click menu, thereby skipping most spam checks for messages from that sender in the future.
- **Sent Items** - All outgoing messages are automatically saved to your Sent Items folder, making it easy to review or resend a message if necessary. Note: Messages sent from a third-party client such as Outlook may or may not be saved in the Sent Items folder. It is dependent on the protocol used to connect that client.

## Creating Email Folders

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

sense to the individual user. That being said, creating a very large number of folders that have large numbers of sub-folders can impact the performance of any email server, not to mention syncing your account with email clients. Note: When creating new folders, DO NOT create sub-folders within your Inbox. While technically possible, many third-party email clients and most mobile devices can not sync sub-folders that are part of a user's Inbox.

To create a new folder, click on the Menu icon at the bottom of the folders view. From that dropdown menu, select New Folder . This will open a new folder window. In the Parent Folder field, select the appropriate directory to save the folder to, or select "Root Folder" to create the new parent folder. Then, type the name of the new folder. Folder names can include letters, numbers, and the hyphen (-), space ( ), and underline ( \_ ) characters only.

To make your SmarterMail folders available from a third-party email client such as Microsoft Outlook, when you set up the account in your client you will need to set it up using IMAP as your incoming mail server type, or use one of the add-on protocols: EAS and/or MAPI/EWS. If you use POP mail, you only have access to your SmarterMail inbox, not any personal mail folders you created to organize messages.

## **Moving Messages to Another Folder**

Moving messages between folders in SmarterMail is easy. You can either move them using the Actions menu or right click on one, or more, messages and select "Move" from the context menu. It's also possible to drag one or more messages from one folder and drop them into another.

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

Right-clicking and then using the Context menu works the same way: Select one or more messages, right click on one of them, select "Move" and then choose the destination folder.

## **Renaming and Deleting Folders**

You can change the name of a personal mail folder anytime or delete it completely when you no longer need it. NOTE: It's not possible to rename any default folders.

To rename a folder, select the appropriate folder in the navigation pane. Click the Menu icon at the bottom of your list of folders and select Rename Folder from the pop out menu. In the New Folder Name field, type the new folder name you want to use. You can also change the directory that the folder is saved to by selecting another directory in the Parent field. Then click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Menu icon at the bottom of your list of folders and select Delete Folder . Then click OK to delete the folder and all of its contents.

The right-click context menu can be used as well, both for renaming a folder as well as deleting a folder.

## Message Archive Search

Message archiving is a method of storing all email and live chat traffic for a domain -- either inbound messages, outbound messages or both -- in a separate location on the mail server. Typically, this feature is used for companies that need mail servers in compliance with the Sarbanes-Oxley Act of 2002 or other regulatory compliance.

It is important to note that message archive search is available to Domain Administrators only when rules are set up individually for their specific domains. If archiving is set up for "all domains" on a server, then only the System Administrators will be able to search the message archive. Therefore, if a Domain Administrator needs access to the email archive for the domain "example.com", then a Message Archiving rule specifically for example.com needs to be set by the system admin.

System Administrators can perform a message archive search by clicking on the Settings icon, selecting Message Archive in the navigation pane, and clicking the Archive Search tab. System Administrators can search for a message by domain, date range, the sender's address, the recipient's address, or the subject.

When message archiving is set up for a specific domain, that domain's Administrator(s) can find a Message Archive Search option by clicking on the Domain Settings icon then clicking on Message Archive Search in the navigation pane. Domain administrators can search for a message by date range, the sender's address, the recipient's address, or the subject.

For more information on archiving, see [Message Archiving](#) .