

Top 10 Guide For System Setup

This outlines basic elements within IFM eMail Manager that **should be configured** for the system to work properly. All of the Administrative functions outlined here can be found in the Maintenance link at the top of the eMail Manager application.

1. **(Required) Create Email Folders** – Click on Maintenance > Folders > Add New Folder

Complete the following:

- Folder Name - This is what will be shown in the folder list.
- Enter at least one of the following:
 - Associated Email - This is the associated email the folder will be receiving OR
 - From Email – This is the email address displayed as From for the folder for responding to email.

Note: If you do not assign an Associated Email, it is recommended that you enter a FROM email address if you plan to send email from this folder.

- Save Changes

2. **(Required) Create Accounts** – Click on Maintenance > Accounts > Add New Account, then select the type of account you want to create.

Complete the following:

- Mail Server (this information comes from your mail host)
- Delete Messages From Server - Mark this checkbox if you want messages to be deleted from the mail server.
- Type
- Username and Password (associated with your mail account)
- Force message into folder - We recommend routing email into folders by using the folders Associated Email or by using Rules.

Note: Forcing email into a folder will overwrite rules and preclude incoming email from being threaded properly if the original email is moved to a different folder.

- Save Changes
- Select and check the box next to the mail account(s) and click “test accounts”. You should receive an “open successful” message. If not, please click on the account under the host column and re-enter the information to make the corrections.

3. **(Required) Create Users** – Click on Maintenance > Users > Add New User

Complete the following:

- Active – Yes
- Username and Password – each should have their own login
- First and Last Name - enter
- Email Address – used for system quota warning messages
- Signature of User - optional
- Access Rights
 - Type – if User is selected, then click on “Edit selection” and highlight folders the User is allowed access to.
 - Type - If Administrator or Super Administrator is selected, then ALL folders are automatically allowed.
- Save Changes

4. (Optional) Create Rules – Click on Maintenance > Rules > Add New Rule

Rules can be used to further steer your emails into a folder or you can choose to delete the emails. Rules are evaluated before the system checks for any Associated Email for a folder.

5. (Optional) Create Standard Replies - Click on Maintenance > Replies > Add New Reply.

Standard replies allow users to use generic responses as replies to emails. Once the responses are added, they will be listed in a drop down menu as a user is responding to an email, which the user would then be able to select and edit if necessary.

6. (Optional) Categories – Click on Maintenance > Categories > Add New Category.

Categories can be used to further organize emails within folders and once entered into this area can then be accessed from the folder or email list.

7. (Good To Know) Filters – Click on Folders, select folder. The view bar, located under the tool bar, allows selection of filtering options for the page.

8. (Good To Know) Stats – Click on Maintenance > Stats. This screen provides an overview of the space utilization on the section. If the account gets within 90% of allotted storage space, a system quota warning email is sent to the address listed in the User section for Administrators and Super Administrators. If the account exceeds the limits, a warning will appear on the application in clear view and reading will cease until space is available. All emails are queued, and when space is available, reading will resume.

9. (Good To Know) Recycle – Click on Maintenance > Recycle > Settings tab. Mark the checkbox and enter the age (in days) of deleted emails, If you want them automatically purged from the system. Each time an email is deleted, a copy of it remains in this bin until it is recovered or purged. There are three ways to manage the recycle bin: Manual Purge/Recovery, Folder Pruning, and Clean Up Attachments.

10. (Good To Know) The system displays a warning to alert you if it is unable to read from your

POP/IMAP accounts. In Maintenance>Accounts, the column entitled “Last Read”, will display the time in BOLD, and RED if it has not been able to access your mail account for more than 1 hour.

For further information or detailed setup instructions to help you get the most out of your eMail Manager system, refer to the *System Configuration Help Document*. Additional help is available in the Help section of the application.