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Making IT Simple

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Webmail System User Guide

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Table of Contents

Welcome and Introduction4

System Requirements4

Warranty and Disclaimer4

Getting Started5

 How to Access Webmail.....5

 Main Webmail Screen.....6

Email6

 Creating a New Message.....7

 Compose8

 Actions.....8

 Attachments8

 Sending Mail9

Checking your Inbox10

 Reading Email10

 Selecting Messages.....12

 Search.....12

 Contacts12

 Calendar13

 Tasks.....15

 Notes.....17

Team Workspaces18

News Feeds18

File Storage.....18

Reports.....18

My Settings19

Account Profile.....20

Signatures.....20

Auto-Responder.....21

 Events.....21

Folder Auto-Clean.....	21
Connectivity.....	21
Spam Filtering.....	21
Content Filtering.....	22
Domain Settings	23
Reminders	23
Logout	23
Help.....	23

Welcome and Introduction

Thank you for choosing ExcalTech to handle your e-mail services. Like many other ExcalTech services, we have strived to bring you the best possible e-mail solution. There are many enhancements and features to our web based e-mail system that you will not find on any other service. Our Webmail system provides an easy way for you to access your e-mail messages from anywhere in the world, using any Internet connected PC, using only a standard web browser such as Internet Explorer. There is no setup or configuration necessary to use the Webmail system, simply open a web browser and login with your username and password! It is that simple! Of course, you can always configure and use a POP3 e-mail program such as Microsoft Outlook to download and read your mail. Our Webmail interface is not meant to replace your POP3 program, it is simply an enhancement when you are away from your mail computer system and need quick and easy access to your messages. For more information on configuring POP3 clients, please see our website. Please read this entire manual to familiarize yourself with all of the options that are available to you.

System Requirements

- Any Internet-ready computer system or device capable of displaying DHTML graphics and running JavaScript
- An Internet connection
- ExcalTech Hosting Service
- Your domain name, username, and password

Warranty and Disclaimer

This manual, the webmail interface, and all features are provided “as is” at no cost to our users. If you do not wish to use the webmail interface, please use a POP3 e-mail client such as Microsoft Outlook, Windows Live Mail, or Mozilla Thunderbird. No warranty or guarantee as to the performance of this system is made by Excalibur Technology Corporation. We are not responsible for any accidental, incidental, or consequential damages that arise from using this system. You assume any and all risk involved by using this system.

Getting Started

How to Access Webmail

Starting the Webmail interface is extremely simple. Open any web browser and type the following line into the address bar: `http://webmail.example.com` where `example.com` is your unique domain name such as `excaltech.com`. Make sure that you **do not type *www*** when you enter the address as this will cause an invalid URL error. When you successfully type the URL, you will see the login screen, similar to below.



Figure 1 – Webmail Login Screen

In the Email Address box, enter your e-mail address. For example, if it is `user@example.com`, you would enter `user@example.com`. In the Password box, enter your mailbox password. If you do not have either of these pieces of information, please see your company e-mail administrator or call ExcalTech for additional help.

Once your information is entered, click the Login button to continue.

Main Webmail Screen

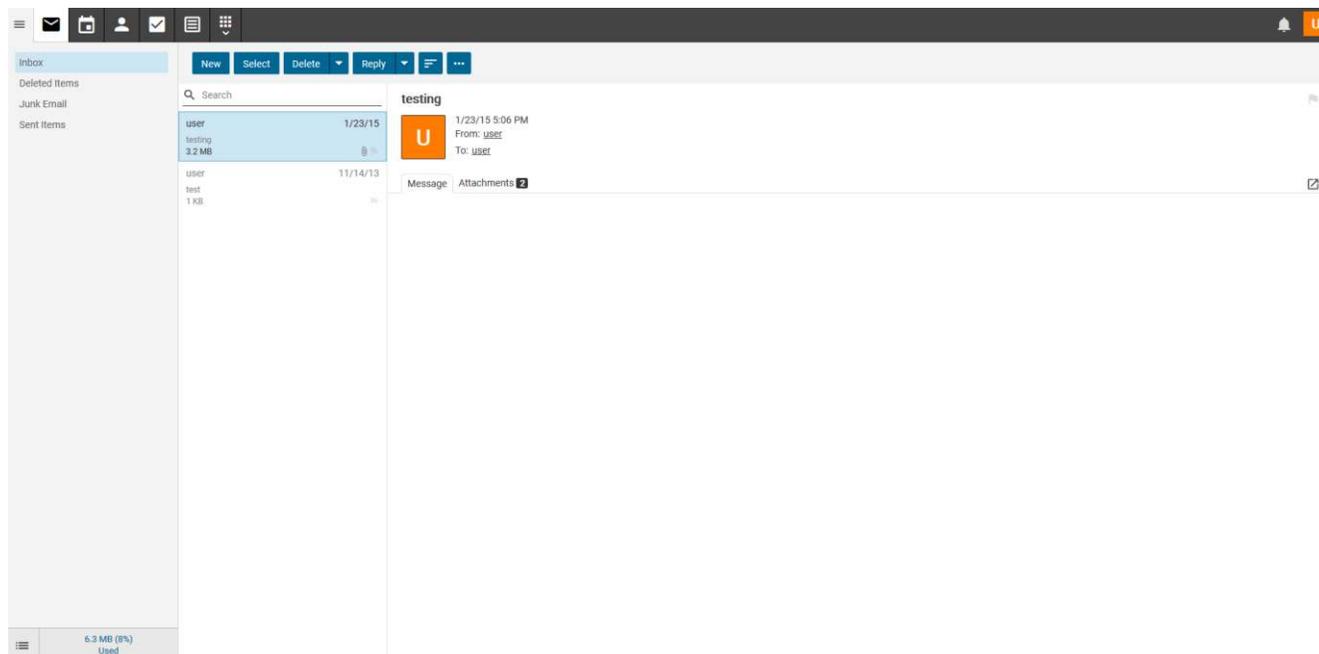


Figure 2 – The Today Page

Once you have successfully logged into the Webmail system, you will see a screen similar to the screen in figure 2.

Each of these sections will be described in detail in the coming pages.

Email

The email section is probably the most important part of the Webmail interface. From this page, you can create a new e-mail, go to your inbox, view deleted items, view drafts, view your sent items and view your “Today” page. Depending on your settings, when you log-in, you will see either your inbox or your “Today” page. Your “Today” page shows any appointments for today, any news items, how many unread messages you have, how much disk space is available and how much is used, and any scheduled tasks for today.

Creating a New Message

When you click on “New”, a window should pop-up similar to figure 3:

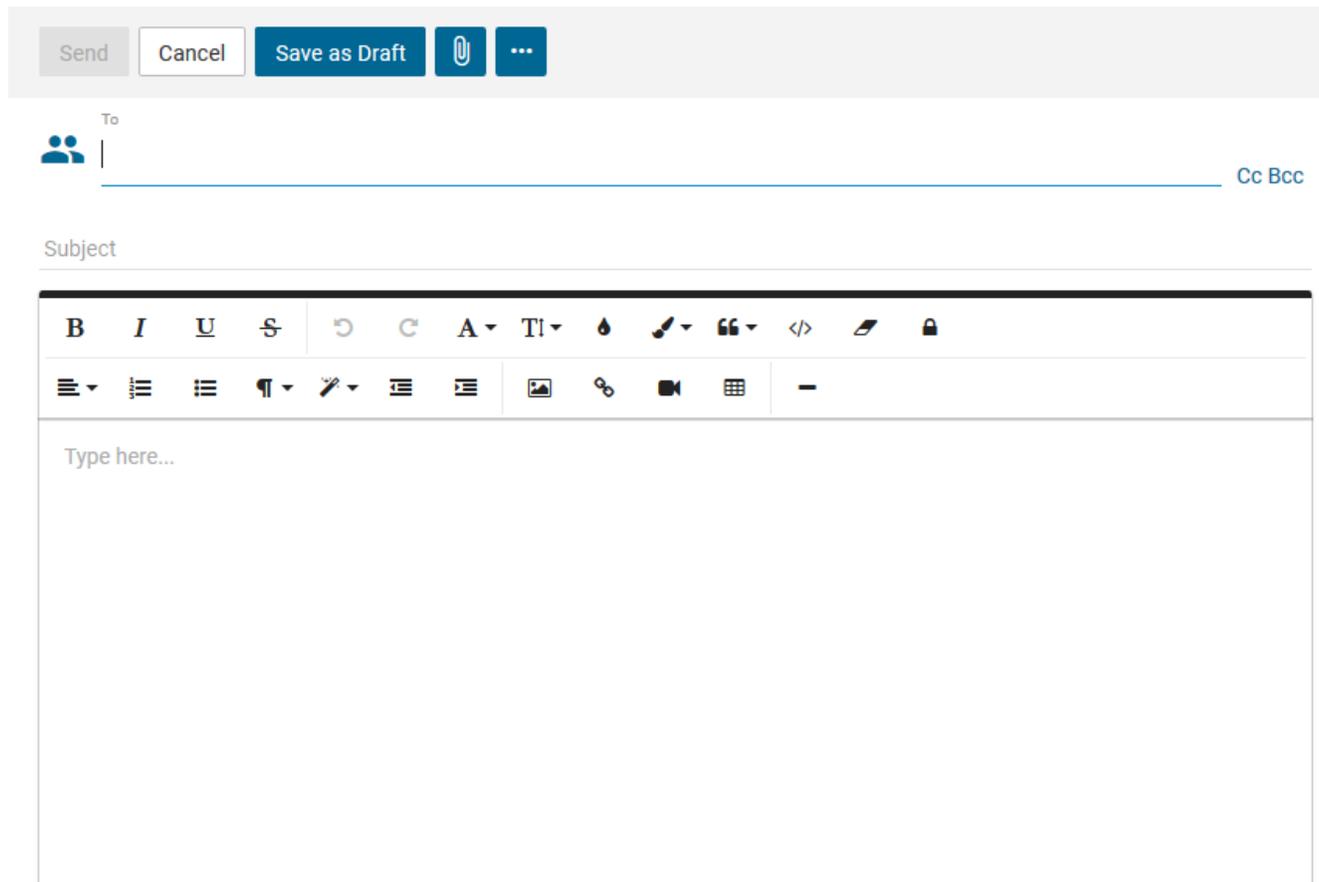


Figure 3 – New Email Popup Box

If no window appears, check that your pop-up blocker didn't block it.

From this window, you can create a message and send it, save it as a draft to e-mail at a later time, or cancel creating a message.

There are three parts to creating a message, namely Compose, Options, and Attachments. These are explained in detail below.

Compose

“Compose” is where you actually create the e-mail. Here, you can specify the recipient of the e-mail, and any carbon copy (Cc) and/or blind carbon copy (Bcc) recipients. You can also enter the subject and body of your e-mail. Fill in the To, Cc, Bcc: and subject lines as you would any e-mail message, separating multiple addresses using a comma (.). If you wish to pick names from your online address book, click the “To”, “Cc”, or “Bcc” text.

Actions

The Ellipsis (⋮) lets you choose the message importance and allows you to request a read receipt, as seen in figure 4.

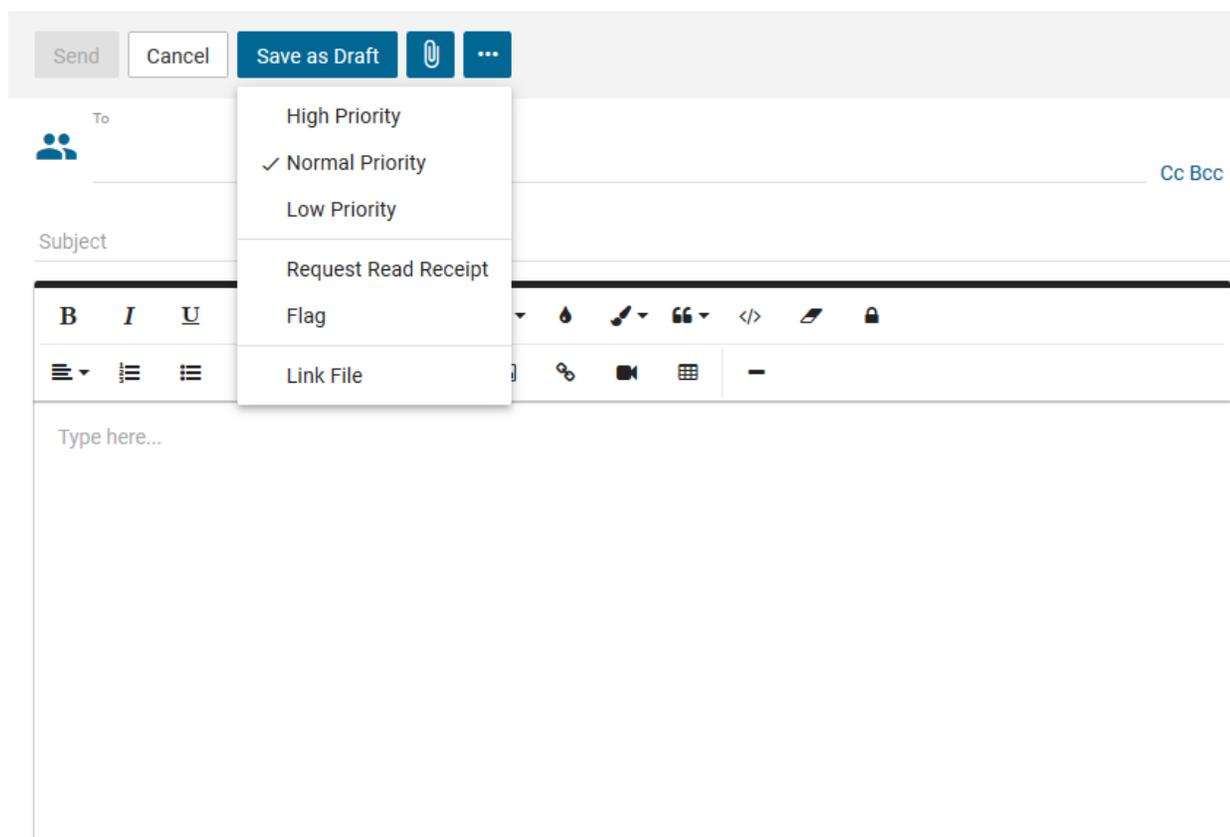


Figure 4 – New Email Options Tab

Attachments

The “Paperclip” (📎) lets you add files to your e-mail. This is discussed in more detail in the “Attaching Files to Messages” section below.

Attaching Files to Messages

If you wish to attach files to your e-mail, click the paperclip () at the top of the New Message window, as seen in figure 5.

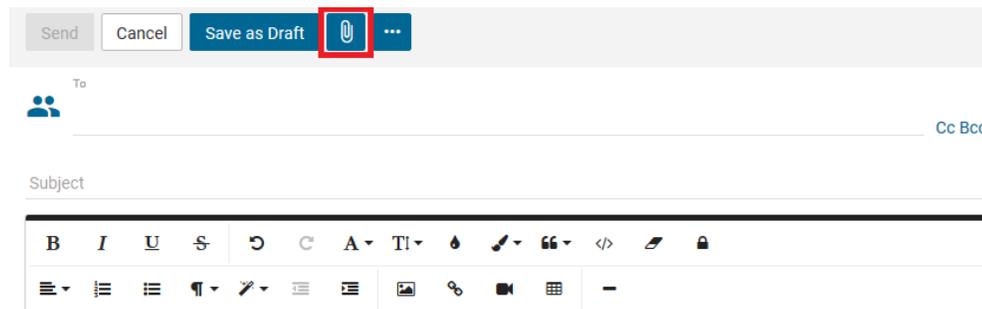


Figure 5 – The Attachments Tab of the New Message Window

Once you click Attach Files, this will bring up a standard file browsing window on your computer (This feature may not work on all systems or all browsers). Browse to the file you wish to attach and click the Open button. There will be a delay as the file is copied from your computer to the Webmail server. The larger the attached file, the longer the delay will be.

Note: File attachments must be less than 10 Megabytes in total size. To send larger file attachments, use a POP3 mail client such as Outlook.

Attached files will show on the bottom of the message. If you wish to remove the attachment click the () to the right of the file.

Sending Mail

When you have finished editing and spell checking your message and have attached any files to the message, you are now ready to send it through the Internet to the intended recipient(s).

To send your message, click the Send button.

If you wish to save your e-mail message for later editing instead of sending it, click the Save to Drafts button. This will place a complete copy of your message in your Drafts folder for later editing and sending.

To cancel sending your messages and abandon any changes you have made, click the Cancel button.

Checking your Inbox

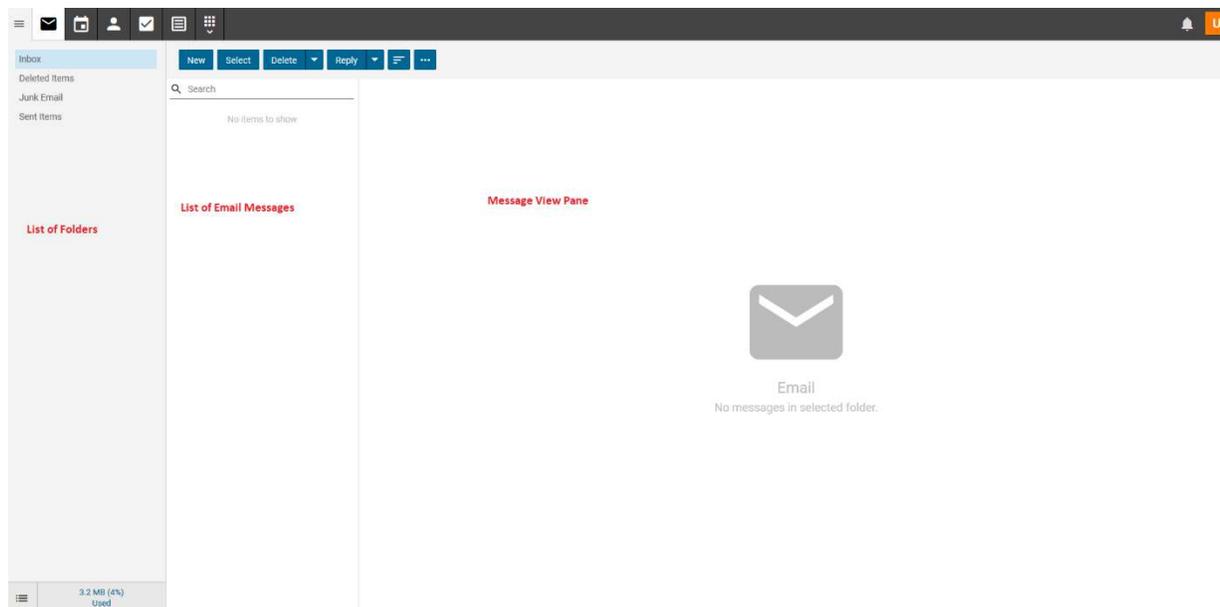


Figure 6 – The Inbox and a Displayed Message

When you first view your inbox, the first message will be selected in the list of e-mail messages and depending on your account settings, the message view pane may show the contents.

Each line represents a unique message. Information displayed about each message includes the address or name (of the sender), e-mail subject, the date and time the message was sent, and the total size of the message. E-mails are initially sorted by date and time with the newest messages being displayed at the top of the list. Messages which have not been read will appear in bold text. Messages which have been read and retained will be displayed in normal text.

Reading Email

To read an e-mail message, simply click the desired e-mail. The mouse cursor will become a pointing finger indicating that you may click the message. Once you click an e-mail message, the contents of the message will appear in the Message View Area.

Your message along with several options will be displayed in the Message View Area. Use the scrollbar on the right hand side of the screen to scroll and view the entire e-mail message, if necessary.

The Message View Area displays options relating to the message, as follows:

- Reply – Send a reply e-mail to the sender. Opens a new e-mail window and copies the current

message into the message.

- Reply All – Same as Reply but sends the message to everyone who received the original message.
- Forward – Same as reply but does not add any e-mail addresses automatically to the outgoing message. This allows you to send the message to another e-mail recipient.
- Print - Allows you to print the message to a printer you specify

user@example.com

Email

Add Contact

- Clicking the person opens a screen ([Invite to Event](#)), allowing you to add the sender to your webmail address book.

Figure 7 – Adding a Contact to Your Address Book

You can either save the contact, or cancel. Further details related to Contacts will be explained later in this manual. In order to continue working in the system, you will need to save or cancel in order to close the mini-window.

When you are done reading your e-mail message, click another mail message or use one of the Toolbar icons to start another task.

Selecting Messages

To select a message or multiple messages for deletion or filing, simply click the message and the background color of the message will change, indicating that the message has been selected. To select multiple messages, use the control key to select them individually, or use the shift key to select a range. Alternatively, you can use the select (**Select**) option and either choose select all or click the messages you wish to collect. You can then use actions (**...**) to Mark, Move, or Delete to affect all selected items.

Search

Click in the search box to search in the folder selected, as seen in figure 8.

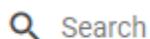


Figure 8 – The Search Bar

Contacts

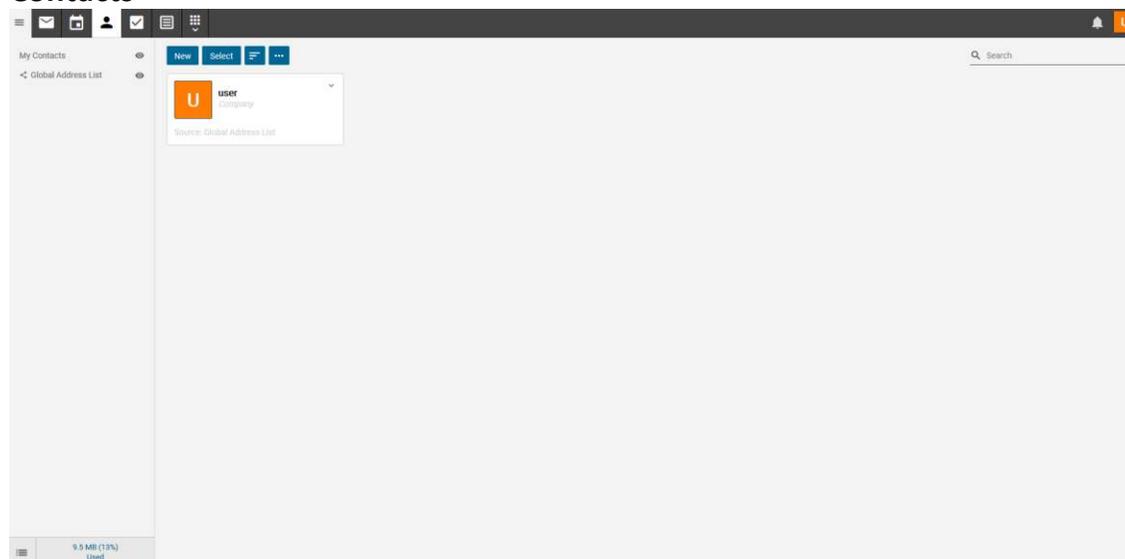


Figure 9 – The Contacts Screen

To add a new Contact, click the “New” button, which will bring up a screen similar to figure 10.

The screenshot shows a webmail interface for adding a contact. At the top left are 'Save' and 'Cancel' buttons. The form is organized into several panels:

- Personal Info:** Includes a 'Display Name' field, a 'Source' dropdown menu (set to 'My Contacts'), and fields for 'Title (Mr./Mrs./etc.)', 'First Name', 'Middle Name', 'Last Name', 'Suffix', 'Home Page', 'Instant Messenger', and 'Birthday'.
- Phone Numbers:** Features a 'Primary Number' field and a 'Phone Type' dropdown menu (set to 'Home').
- Email Addresses:** Includes a 'Primary Email Address' field with a close icon (X) and a general 'Email' field.
- Home Address:** Contains fields for 'Address', 'City', 'State / Province', 'Zip Code', and 'Country'.
- Work Address:** Contains fields for 'Address', 'City', 'State / Province', 'Zip Code', and 'Country'.
- Work Info:** Includes fields for 'Company', 'Job Title', 'Department', 'Office', and 'Website'.

Figure 10 – The Add Contact Screen

To edit a contact’s information, select the contact and a new window will open allowing you to modify the contact.

To delete a contact(s), you would click select (**Select**) and click the contacts. Once selected click selected (**X Selected (2)**) and choose the delete option.

Calendar

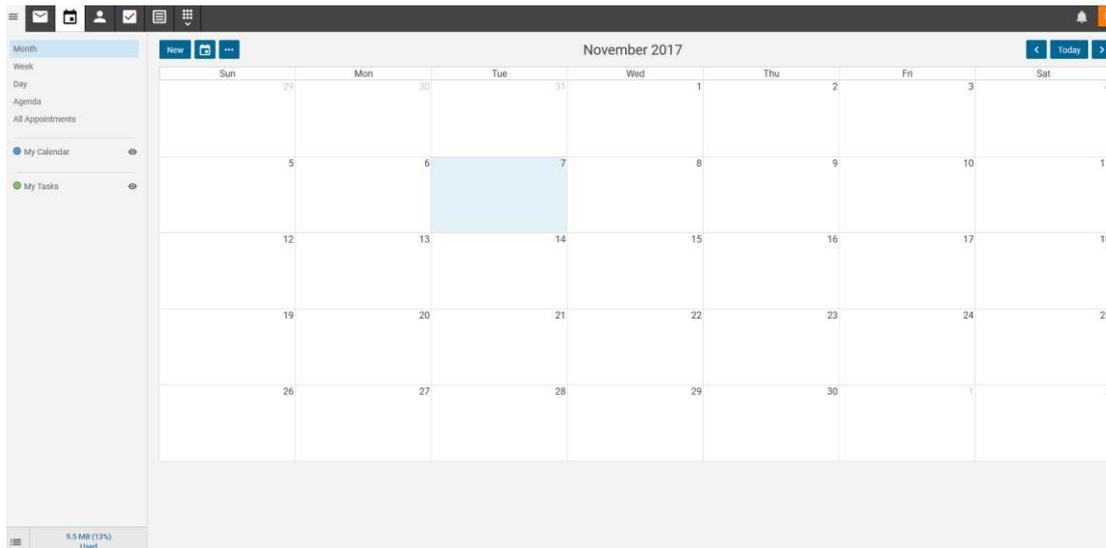


Figure 11 – The Calendar Screen

In the Calendar section, you can set-up and manage appointments in webmail. To create a new appointment, click the “New” button in the toolbar. This will cause a pop-up to appear (figure 12).

Figure 12 – The New Appointment Screen

In this window, you provide a subject, attendees, a location and time for the appointment, and can set a reminder to be sent before the appointment to any e-mail address. The Attendees can be added from your contact list in webmail, and the “Availability” box allows you to check a person’s availability if they have shared their calendar and allowed you the appropriate access.

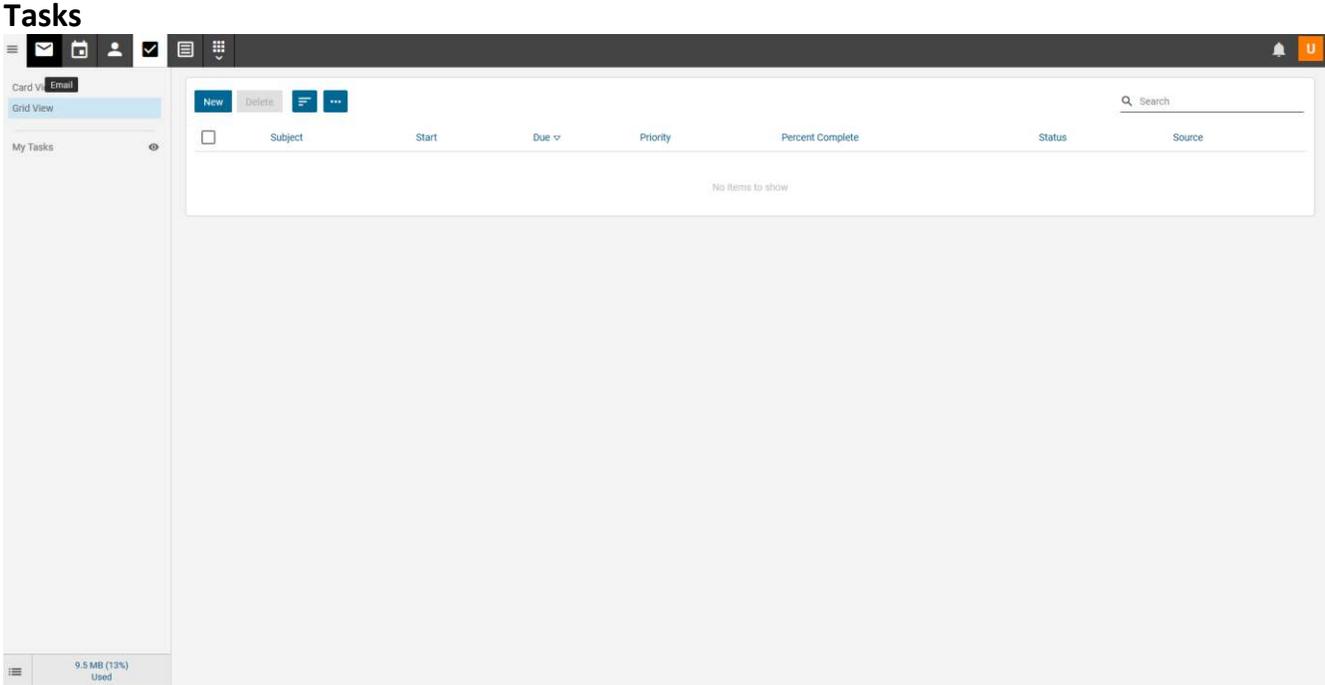


Figure 13 – The Tasks Screen

Inside the “Tasks” component, you can create tasks. When adding or editing a task, a pop-up window will show (figure 14).

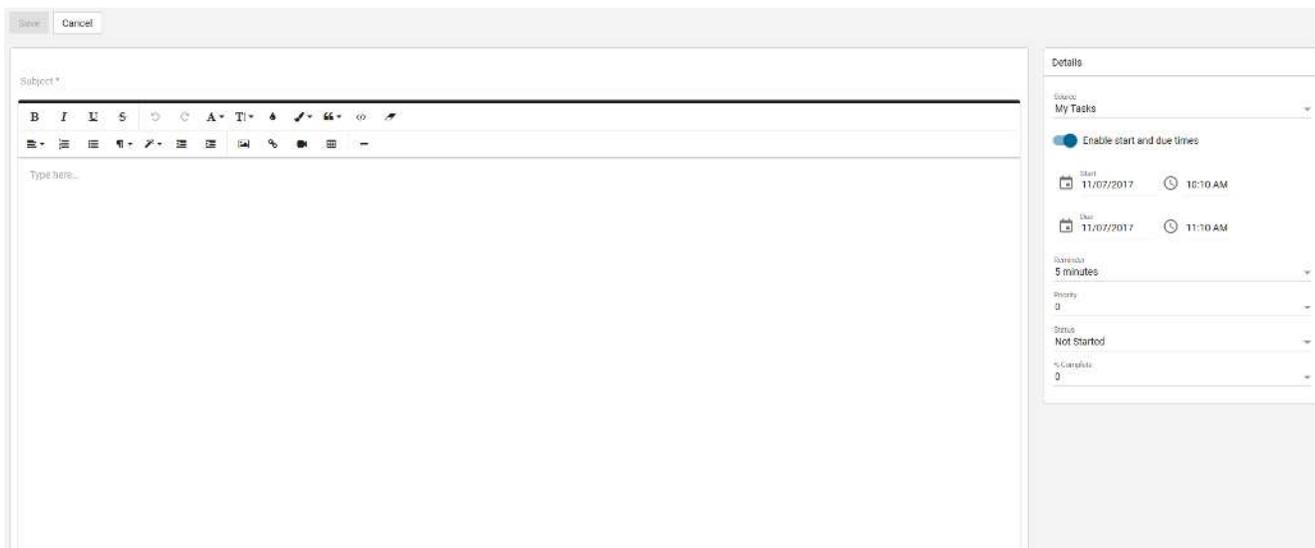
The image shows a web-based task creation window. At the top left, there are 'Save' and 'Cancel' buttons. Below them is a 'Subject *' field. The main area is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and image. Below the editor is a large text area with the placeholder 'Type here...'. On the right side, there is a 'Details' sidebar. It contains a dropdown menu for 'My Tasks', a toggle for 'Enable start and due times', and several fields: 'Start' (11/07/2017, 10:10 AM), 'Due' (11/07/2017, 11:10 AM), 'Reminder' (5 minutes), 'Priority' (0), 'Status' (Not Started), and '% Complete' (0).

Figure 14 – The New Task Window

In this window, you specify a subject for the task, a description, when it should be started, when it's due, when to get a reminder, its priority, status and % complete.

Notes

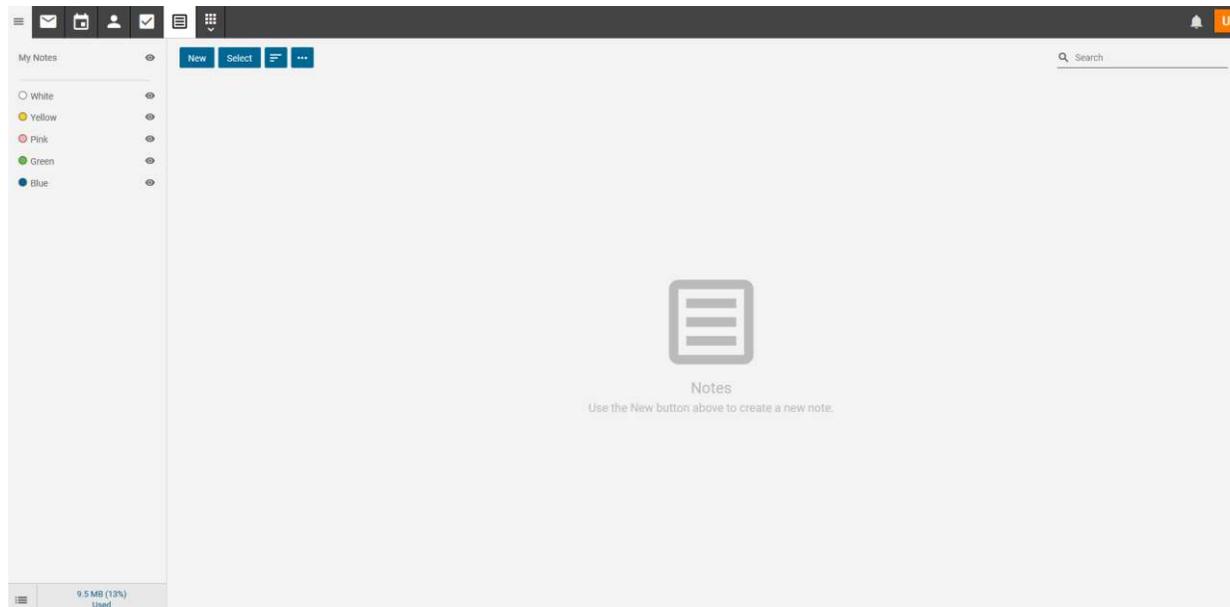


Figure 15 – The Notes Screen

The “Notes” section enables you to add personal notes. You can give different notes different colors, perhaps using each color for a different category of note. When adding or editing a note, you’ll see the screen shown in figure 16.



Figure 16 – The New Note Window

Selecting the apps () will get you to the next set of windows

Team Workspaces

Team workspace allows users to collaborate with others and form meetings. Audio/video is limited to a maximum of 8 users and may require additional software.

News Feeds

RSS feeds allow people to automatically be notified when a website contains new posts or entries.

Actions - Click () in the lower left corner and select the appropriate option.

File Storage

Allows users to upload files to the mail server and share them by sending out links to those files.

Actions

- **Delete** - Permanently removes the selected file(s) from the server.
- **Upload** - Uploads a new file to the server.
- **Download** - Downloads the selected file(s).

Reports

The webmail system includes reports, and you can create your own reports. This is an advanced feature which is outside the scope of this document. Please refer to the online help or call the ExcalTech Help Desk for additional information.

My Settings

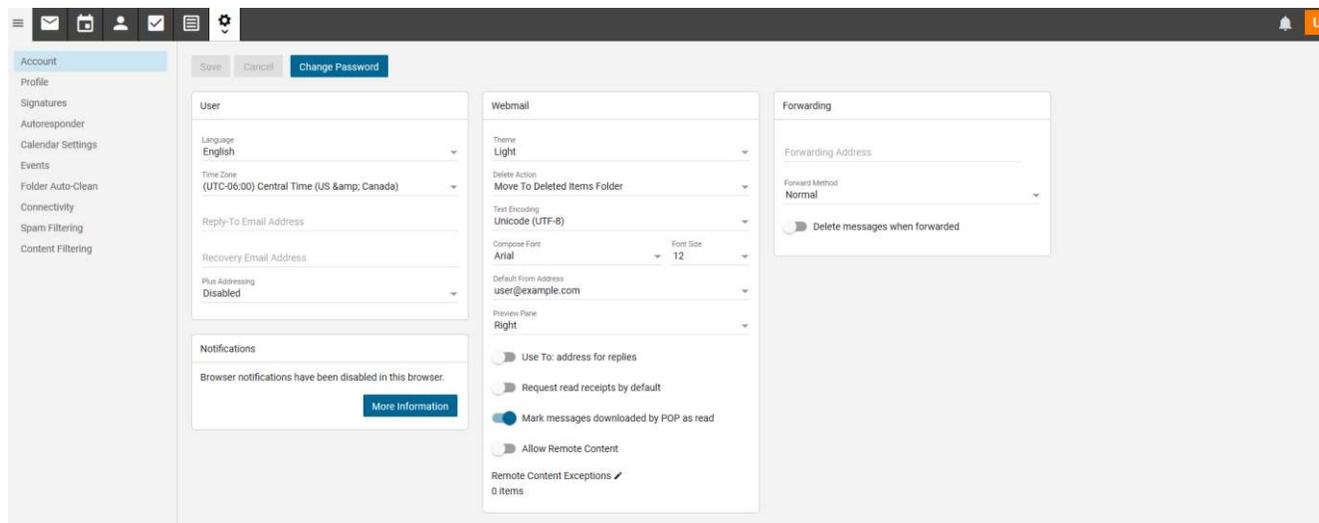


Figure 17 – The Settings Screen

The “Settings” area allows you to customize your Webmail experience.

Account Settings

The Account Settings section has the following sub-sections:

User

This section allows you to change your Language, Time Zone, Reply-To e-mail address, recovery email address and Plus addressing (see below for more information).

Notifications

This section will allow you choose what notification you may receive, if enabled in a compatible browser.

Webmail

This section has various options that let you set-up defaults for your Webmail account. You can change your theme, delete action, text encoding, new email font, default from address, preview pane location

Forwarding

This page allows you to automatically forward e-mails to another e-mail address and optionally delete them.

Plus Addressing

This feature allows you to automatically filter e-mails sent to you without creating rules. For instance, if you want to sign-up for a newsletter, you can sign-up for the newsletter with the e-mail address of user+newsletter@example.com (if your normal e-mail is user@example.com). Then, when an e-mail is sent to user+newsletter@example.com, the e-mail will be moved into a “newsletter” folder due to the +newsletter in the e-mail address. This folder will be on the same level as your Inbox folder.

You can also use backslashes in the e-mail address to further filter e-mails into subfolders. For instance, you can use user+newsletter/ExcalTech@example.com to sign up for a newsletter and have the e-mail go into an ExcalTech folder inside of your newsletter folder. In order to have the subfolder be inside of your inbox folder, you can use user+inbox/newsletter@example.com.

You have 3 options for what to do with the e-mail, and whether you want the feature enabled. Your 3 options are “Move to Folder,” “Move to Folder (if Exists),” and “Leave in Inbox.” “Move to Folder” will move the e-mail to the specified folder, creating the folder if necessary. “Move to Folder (if Exists)” will move the e-mail to the specified folder if it exists, or leave it in the Inbox if the folder does not exist. “Leave in Inbox” will leave the e-mail as-is.

Account Profile

The Profile section allows you add details about yourself. The subsections are Personal Info, Phone Numbers, Email addresses, Home address, Work address, and work info

- Personal Info allows you to update your Display Name, Title, name (first middle and last), suffix, home page, instant messenger, and birthday.
- Phone numbers allows you to add you phone numbers based on type.
- Email addresses allows you to enter any additional email addresses you may have
- Home address allows you to enter your home address information
- Work address allows you to enter your work address information
- Work info allows you to updated your company information

Signatures

This section enables you to create signatures for your outgoing e-mails. Instead of typing a signature on every e-mail, you can create one here. Use the mapped field to select the default. This signature is only used on e-mails you compose in webmail. So, if you’re using Outlook or another POP3 client, you may need to create your signature there also, depending on your company policies.

Auto-Responder

This section enables you to automatically send a prewritten response when an email message is received. They are commonly used to notify senders that the recipient is out of the office or on vacation.

Events

The “Events” section allows you to respond to various events that occur. Some events include when you receive an e-mail, when you send an e-mail, and when your disk space usage is at a certain level. When you send an e-mail, you might want to add the person you send the e-mail to your Trusted Senders list. Instead of doing so manually, you can use an event to automatically do so. You can set-up an event so that when your mailbox is getting full, you are sent a notification by e-mail to any e-mail address you select, or by using a Notification Profile. (Notification Profiles are covered earlier in this manual).

Folder Auto-Clean

Folder Auto-Clean lets you set limits on how much of your disk space is used by your Junk E-mail, Sent Items and Deleted Items folders. By setting limits, these folders will not become full, which means your account will not become full.

- The options you have are “Use default settings” or “Override settings for this account.”
- If you decide to override settings, the “Rules” section will allow you to add a new rule.
- When adding a rule, you choose the Folder to auto-clean and whether to clean it based on size or date. If you choose to clean it based on size, you specify the size before and after the auto-clean. This will allow you to keep specified folders a certain size. If you choose to clean it by date, you enter the number of days to keep an e-mail before deleting it from the specified folder. This will let you automatically remove old e-mails.

Connectivity

Connectivity allows you to connect external providers, not provided by webmail. The subsections are Cloud Storage, Email Retrieval and SMTP Accounts.

- Cloud storage allows you to link Google Drive, Dropbox and Onedrive to your webmail
- Email retrieval allows you to link an external POP or IMAP account
- SMTP Accounts allows you to add another email address to send as.

Spam Filtering

Spam filtering enables you to specify actions to take on possible spam.

- You can use the default settings, or override settings for your account.
- The Trusted Senders is unique to each account and can be changed regardless of the setting you choose in the Options section. Trusted Senders can be either an e-mail address, such as user@example.com, or a domain name, such as excaltech.com. Any e-mail from those addresses will bypass spam filtering.
 - If you choose to override settings, in the Options Section, there are three spaces to fill in; based on the probability the e-mail is spam.
 - The actions you can take are “No Action,” “Delete Message,” “Move to Junk E-mail Folder,” and “Add Text to Subject.”
 - The three settings are individual, so you might decide to delete messages with a High Probability of being spam, send those with a Medium Probability to the Junk E-mail, and add text to the subject for those with a Low Probability.

Content Filtering

Content filtering allows you to specify rules for incoming e-mails. This allows you to automatically treat e-mails based on criteria you specify, which can help your mailbox stay organized.

- The first step is to choose which criteria type(s) you want to use. These include “From Address,” “Containing Word,” “To Address,” “Attachments,” and “Other.” You can choose multiple criteria in order to better organize e-mails. That is, e-mails from an individual with a specific subject can be treated one way, and e-mails from that same individual with a different subject can be treated differently, if you set-up two filters.
- After choosing your criteria type(s), you specify the value(s) to check for each criterion.
- Finally, you give your rule a name and specify an action to take. The actions include Delete Message, Bounce Message, Move Message, Prefix Subject, Add Header, Copy Message, and Reroute Message.
 - Delete message deletes the message. You’ll never see it in your Inbox, and it is not recoverable, so be careful when using it.
 - Bounce message sends a response to the sender that the e-mail has been bounced.
 - The message is delivered to you unless you also choose to delete it, or if your set-up has bouncing disabled.
 - Move Message moves the message to a specified folder. If you set this up and later delete the folder, the folder will be re-created when the filter matches.
 - Prefix subject allows you to add text in front of the subject, which can help you find e-mails later, as they’ll all have a similar subject.
 - Add header adds an e-mail header to your e-mail. You will not see it unless you view the headers, but it can be useful to filtering in Outlook and other e-mail

clients if you're using them.

- Copy message forwards the message to the given address and delivers it to you.
- Reroute message sends the message to the given address, but does not deliver it to you.

Domain Settings

This is an advanced feature which is outside the scope of this document. Please refer to the online help or call the ExcalTech Help Desk for additional information.

Reminders

Clicking this link opens a pop-up window with a list of reminders. The reminders are based on events you've set-up in the "Calendar" and "Tasks" sections of webmail. You can snooze items for up to 3 days, dismiss all reminders, dismiss selected reminders, or close the window. You can also view reminders that you snoozed on.

Logout

This link logs you out of webmail.

Help

This page displays additional on-line help. This is useful if you are away from this copy of the manual and need immediate help.

When you click the "Help" link on any screen, you can find out more information regarding the page you're on, browse topics, search the Online Help for more help, or close the Help prompt and continue working in the webmail system.