# Mailsmith™ 1.0 Demo

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**Note:**

This document contains a sub-set of the Mailsmith 1.0 User Manual. It includes information on configuration of the Mailsmith application, and on the filtering and query features, for your use while evaluating the Mailsmith Demo package. (We have also included the full table of contents, so that you can see all of the information provided in the standard manual.)

# Licenses, Copyrights, and Trademarks

# Contents

# Chapter 1 • Welcome to Mailsmith

This guide contains instructions for using Mailsmith. If you are just getting acquainted with Internet email, we recommend that you familiarize yourself with this guide, paying close attention to the initial chapters. If you are an experienced email user, you may wish to proceed directly to Chapter 2 for installation instructions.

**In this chapter**

- What is Mailsmith?

- How Can I Use Mailsmith?

- Getting Help

## What is Mailsmith?

Mailsmith is an Internet email client that supports the SMTP (Simple Mail Transfer Protocol) and POP3 (Post Office Protocol 3) protocols for sending and receiving email messages. Mailsmith is suitable for use over the Internet directly or across Local Area Networks (LANs) that employ the same communications protocols as the Internet.

Mailsmith is designed by Macintosh users for Macintosh users to make sending, receiving, and managing email as intuitive and efficient as possible.

Mailsmith incorporates and capitalizes on much of the functionality of our flagship product, BBEdit. Mailsmith stores messages in an object-oriented database. Like BBEdit's, the Mailsmith architecture is extensible, enabling third-party developers to create plug-ins that provide additional functionality.

## How Can I Use Mailsmith?

Mailsmith provides a depth of functionality that makes it an appropriate tool for both casual email users and "power users" who receive and store thousands of messages. New users will appreciate its graceful and flexible interface, and more sophisticated users will find its range of powerful features (searching options, filtering capabilities, extensibility via AppleScript support and plug-in architecture, etc.) indispensable from the outset.

Mailsmith runs on most Mac OS systems. Please refer to Chapter 2, Installing Mailsmith, for a complete list of system requirements and installation instructions.

# Getting Help

There are several different types of Mailsmith help resources. This section provides a brief description of each.

- Balloon Help

- Electronic & Printed Documentation

- The Bare Bones Software Web Site

## Balloon Help

To activate Balloon Help, select:

- Show Balloons from the Help Menu (under Mac OS 8.x)

- Show Balloons from the Apple Guide menu (under System 7.x)

For areas of the Mailsmith application in which Balloon Help is available, use the cursor to point at the area of interest. The Help balloon associated with that area will be displayed.

To turn off Balloon Help, choose Hide Balloons from the Help or Apple Guide menu.
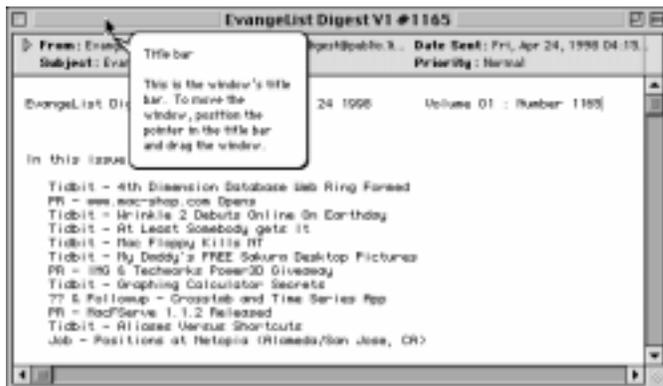


Figure 1-1: An example of Mailsmith's Balloon Help.

## Electronic & Printed Documentation

The Mailsmith User Manual (this document) is the definitive reference for Mailsmith. It exists in both printed and electronic formats. The electronic version is included on the program CD-ROM as Adobe Acrobat Reader (PDF) files. There are two different document layouts available: one formatted for printing on US letter- sized paper, and one formatted for printing on A4-sized paper. To view either of these files, you must install a copy of the Acrobat Reader application, which has also been included on the program CD-ROM.

Mailsmith User Manual.pdf

Figure 1-2: The Mailsmith User Manual is available in printed and PDF formats.

## Bare Bones Software Web Site

The Bare Bones Software Web site provides up-to-date information on Mailsmith, BBEdit and other Bare Bones Software products including product updates, patches, extensions, plug-ins, and other support and informational materials.

The Bare Bones Software site is located on the World Wide Web at:

`<http://web.barebones.com/>`

For support help and information, follow the link to the Support area, where you'll find a wide range of information including:

- **Frequently Asked Questions** (FAQ) —Information on prices, ordering, updates, upgrades and product support. We strongly recommend you read the FAQ, as common questions and solutions are likely to be there.

- **Product Support Bulletins —**Bulletins about operational problems, bugs, or idiosyncrasies in using Mailsmith with third-party products.

- **Email and Phone Support** —If you have a licensed version of Mailsmith or any other Bare Bones product, and you can't get the information you need in any of the above resources, send email to:

  `<support@barebones.com>`

  Technical support is also available by telephone at (781) 687-0700.

Updates, patches, product information and freeware are also available for download from the Bare Bones Software FTP site located at:

`<ftp://ftp.barebones.com/pub/>`

(log in as User ID: `anonymous`, Password: `your@email.address`).
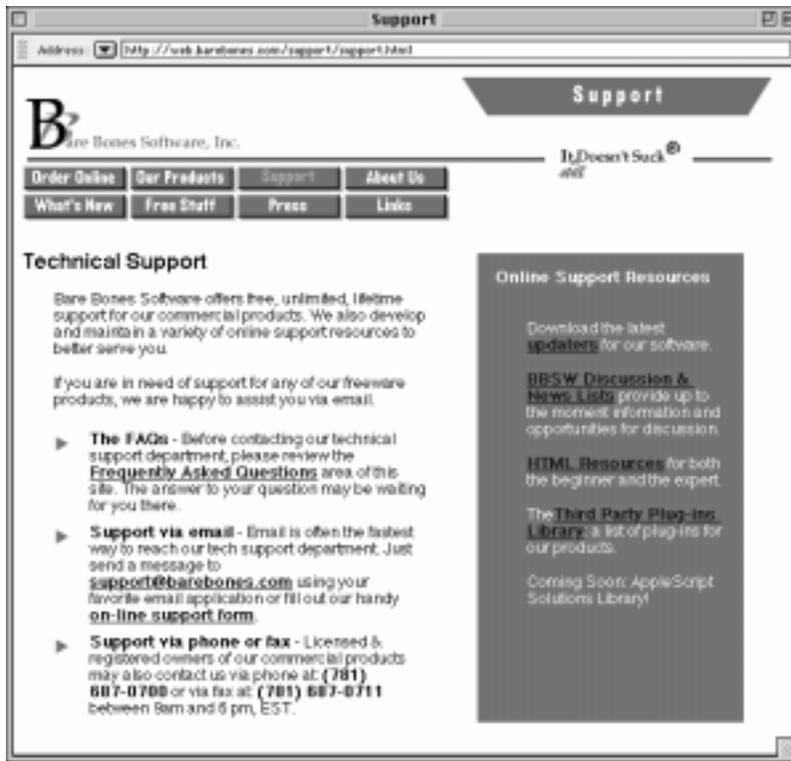
Figure 1-3: The Product Support Form on the Bare Bones Software Web site.

# Chapter 2 • Installing Mailsmith

This chapter provides instructions for installing Mailsmith and its associated components.

**In this chapter**

- What You Need to Get Started

- Basic Installation

- Internet Config

- Special Mailsmith Folders & Files

## What You Need to Get Started

Before beginning the installation process, ensure that you have all of the items listed in the System Requirements and Email Account sections of this chapter.

### System Requirements

- System 7.5 or later

- MacTCP 2.0.6 or Open Transport 1.1.2 or later

- RAM: 16MB installed/Power Macs or 8MB installed/680x0 Macs

- Hard Disk Space: approximately 8MB, plus additional space for mail

- Macintosh with 68020 processor or later

- CD-ROM Drive (*Diskettes available*)

### Email Account

Mailsmith is for use with ISP (Internet Service Provider) email accounts or Internet-style IP-based network email accounts. Mailsmith supports the POP3 and SMTP protocols. If necessary, check with your ISP or system administrator to be sure you have an appropriate account.

## Basic Installation

To install Mailsmith, launch the Install Mailsmith application on the Mailsmith CD-ROM. The Easy Install option installs all the software needed to use Mailsmith.
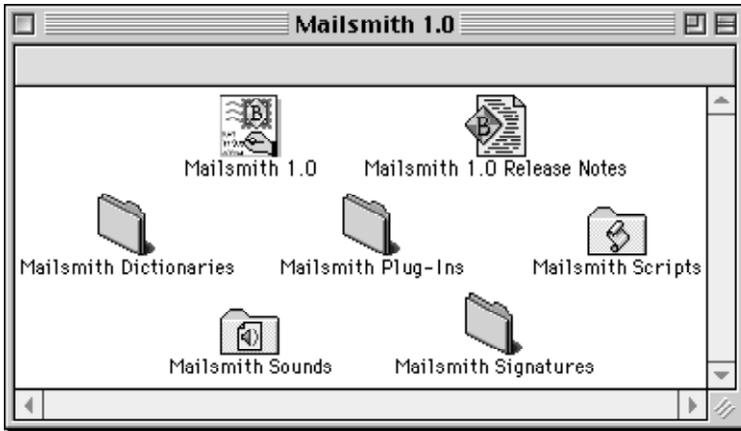
Figure 2-1: The default installation folder for Mailsmith.

If necessary, the Custom Install option of the Install Mailsmith application can be used to install or reinstall the Mailsmith components, such as the Internet Config program, plug-ins, or electronic documentation.

## Internet Config

Internet Config is a public domain program written by Peter N. Lewis that pre-configures common preferences and settings so they are available to multiple applications, such as Mailsmith, Netscape Navigator, Internet Explorer, etc. Many applications are "Internet Config-aware," meaning they will look to Internet Config for configuration preferences. Mailsmith makes extensive use of Internet Config, which consists of three parts:

- The Internet Config extension

- The Internet Preferences file

- The Internet Config application

You won't interact with the Extension and the Preferences file directly because that is the job of the Internet Config application. When you launch the application for the first time, the Preferences file and Extension will be installed automatically, if they do not already exist on your system. To see if Internet Config is already installed on your system, go to the Apple Menu and select Find File (or press Command-F in the Finder) and search for "Internet Config" on your hard drive.
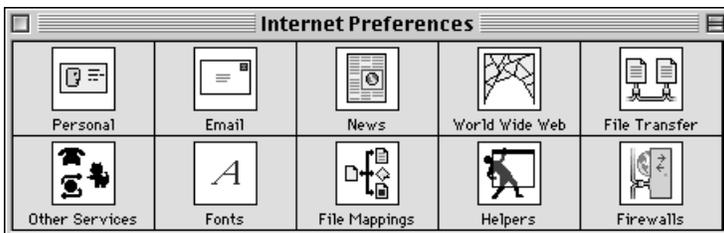


Figure 2-2: The Internet Config application window.

To prepare Internet Config for use with Mailsmith, you will need to fill in a few fields. There are many aspects to Internet Config that don't apply to using Mailsmith, but the basic information is essentially to get you started.

First, launch Internet Config by double-clicking on the application in the Internet Config folder. If the Internet Config Extension isn't installed, it will be installed for you and you can continue to use the application without restarting.

Next, select the item called Personal, shown in Figure 2-3, by clicking on it once or by pressing Command-1, and fill in the following fields:

- Real Name (required)—Your real name

- Organization (optional)—Your organization or school

- Quote String (optional)—This is most commonly a greater-than ">" sign followed by a blank space, which is used to offset text in a message to which you are replying or forwarding. The quote string will appear at the beginning of each line of text you are quoting.

  Sample quotation:

  ```
  > Yes, I think your suggestion makes a lot of sense.
  > To be honest, I don't know why we didn't think of
  > making the change you recommended on our own.
  ```

- Signature (optional)—A brief entry that is added at the bottom of each message you send. More information about signatures is given below.



Figure 2-3: The "Personal" section of Internet Config.

(You may see some unfamiliar spellings in the Internet Config program, but that's OK. The people who created it are from Australia, and they often use British spellings.)

The *Signature* is a quotation, address, business reference or professional identification that can be appended automatically to all your messages, if you wish. Signatures are sometimes also called *sigs* or *dot sig files* (.sig). Signatures can be quite creative, including ASCII art, poems, and pithy sayings. Long signatures are not a good idea, especially if you post frequently to newsgroups, but short, tasteful, appropriate signatures are an accepted part of Internet communications, like a business card or logo. It's usually best to limit a signature to three or four lines.

The next step is to tell Internet Config about your primary email account. If you are unsure of how to enter a field, please consult your Internet Service Provider or System Administrator. Select the Email button to fill out the information shown in the figure below:

- **Email Address** (required) —The address which should be used to send a message to you: john_doe@GreatISP.com

- **Mail Account** (required) —The location of your server account, which may differ from your email address: john_doe@mail.GreatISP.com

- **Mail Password** (optional)

- **SMTP Host** (required) —The address of the server used by your email account to send mail via the Simple Mail Transfer Protocol (SMTP).

- **Mail Headers** (optional) —Optional mail headers that are attached to your outgoing messages, which may be viewable by other email clients. These are sometimes referred to as X-Headers, when the prefix X- is added to the header title (so as not conflict with the standard message header fields).

- **On New Mail** (optional) —Optional actions (like playing alert sounds and opening alert dialogs) that should take place when new messages arrive.



Figure 2-4: The Email section of Internet Config.

With Internet Config, you can also specify Mailsmith as your email application to other Internet Config-aware applications. To do this, select the Helpers button (Command-9). Then, select the "mailto" item, shown in Figure 2-5; click the Change button and follow the on-screen instructions.
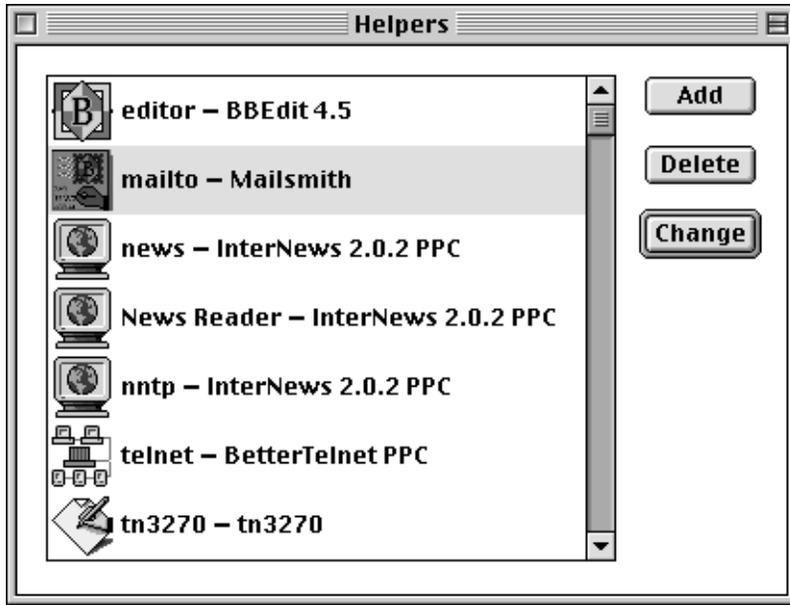
Figure 2-5: The "mailto" section of Internet Config's Helper applications.

If you need to receive mail from additional servers, you can specify them in the Email Accounts window. For detailed information on setting up email accounts, refer to Chapter 3.

Now that you have set up Internet Config you can proceed with using Mailsmith.

Before we go on to Chapter 3—Configuring Mailsmith, a brief introduction to the files and folders in the Mailsmith Folder is in order.

# Special Mailsmith Folders & Files

This section identifies the files and folders created when the Easy Install option of the Mailsmith Installer is executed.

## Mailsmith Address Book

The Mailsmith Address Book file stores all of the information entered into the address book. This file is created the first time you launch Mailsmith.

## Mailsmith Data

This folder contains:

- Mail Filters—Contains Mailsmith mail filters.

- Mailboxes folder—Contains all Mailsmith mailboxes.

- Mailsmith Post Office—The database of stored mail.

- Outgoing Mail folder—Holds outgoing mail.

## Mailsmith Dictionaries

The Mailsmith Dictionaries folder contains the full set of language and terms dictionaries that you can use with Mailsmith's spelling checker, as well as an empty User Dictionary file.

## Mailsmith Documentation

This folder contains the Mailsmith User Manual in electronic format. As mentioned in Chapter 1, there are two different versions of the file. One is formatted for printing on US letter-sized paper, and the other for printing on A4-sized paper.

Both of these files are PDF documents and may be viewed with Adobe Acrobat Reader (included on the CD-ROM).

## Mailsmith Logs

This folder will be created the first time you launch Mailsmith, and it contains the:

- Mailsmith Filter Log

- Mailsmith Mail Activity Log

- Mailsmith Mail Errors Log

## Mailsmith Plug-ins

Mailsmith uses plug-ins to provide additional functionality, including supplemental text editing features and utility operations. These plug-ins are located in the Mailsmith Plug-ins folder inside the Mailsmith folder. Several plug-ins are installed as part of the default installation. For more information on plug-ins, see Chapter 13.

## Mailsmith Preferences

This folder contains the Mailsmith preferences file. Mailsmith stores its preferences in this folder within the Mailsmith folder, not the System Folder.

## Mailsmith  Scripts

All scripts that appear on the scripting menu are stored in this folder. To use the scripts on the program CD-ROM, simply place them inside this folder.

## Mailsmith  Signatures

Signatures listed on the popup menu in the Email Accounts Window are stored (as text files) in this folder. To add a signature file to Mailsmith, place it in this folder.

## Mailsmith  Sounds

The Mailsmith Sounds folder contains custom sounds which may be played when new mail arrives or as the result of a filter action. Notification sounds are subject to the settings specified in the Notifications panel of the Mailsmith Preferences Dialog.

# Chapter 3 • Configuring Mailsmith

This chapter provides instructions for configuring Mailsmith and importing messages, filters, and address books from other email clients using scripts included on the program CD-ROM.

**In this chapter**

- Master Password

- Setting Up Email Accounts

- Verifying a New Email Account

- Importing Email From Other Applications with Scripts

- Importing Filters and Address Books From Other Applications

## Master Password

When you launch Mailsmith, the first thing to appear is the Master Password dialog box. It is used to specify a Master Password for Mailsmith. If present, the Master Password acts as a key which is required to access your stored mail. (The Master Password is not the same as an email account password, which is used only to obtain mail from a server.)  If you need to protect your email, this feature can be very useful—particularly in environments in which you cannot guarantee that you are the only person who will have physical access to your machine. You are not required to specify a Master Password if you do not wish to do so.

Master Password settings are accessed from the Security panel of the Preferences window. To open the Preferences window, select the Preferences menu item from the Edit menu. To change the Master Password, select Security from the list at the left. The Change Master Password button displays a password dialog box which enables you to type a new Master Password.

Generally speaking, it is a good idea to change passwords periodically. To be effective, passwords should be difficult for others to guess and contain characters that are not often used. Your birthday, social security number, and your dog's name are good examples of passwords that would be easy to guess. Figure 3-1 shows the Change Master Password dialog box.
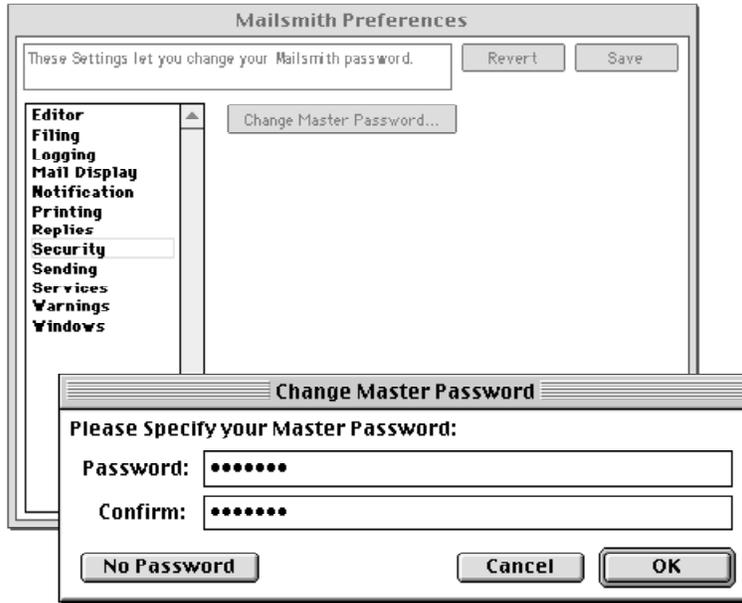
Figure 3-1: You can opt to use the Master Password feature to protect your email.

If you choose the No Password option, be aware that anyone can sit down at your computer and read any email that has already been downloaded to your hard drive or sent from your machine.

## Setting Up Email Accounts

Mailsmith is capable of accessing multiple email accounts. It uses your Internet Config preferences to configure its default account settings. These settings can be edited from the Email Accounts window. Figure 3-2 shows how the settings entered through Internet Config are used for Mailsmith's default account settings.
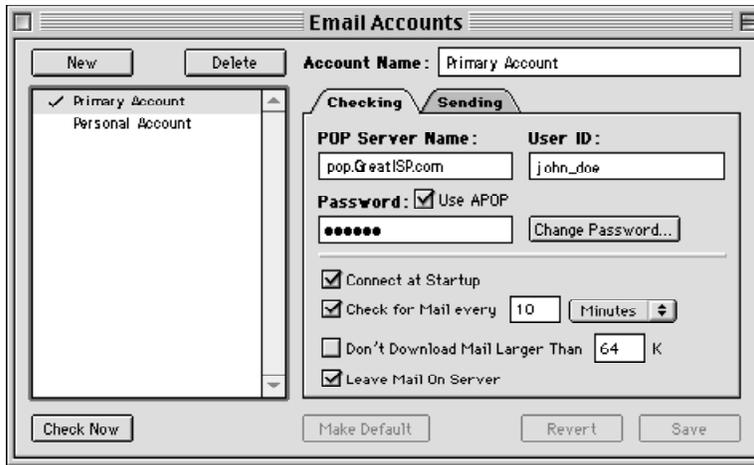
Figure 3-2: Mailsmith's account settings window includes information obtained from Internet Config's preferences.

The Email Accounts window (found in the Windows menu) opens a window with a list box on the left. On the right, there are two panels labeled Checking and Sending containing fields, as shown in the above figure. To add a new account or delete an existing account, use the buttons above the list area of the window.

It is important to understand the purpose of each field, as the information you provide here is used in other parts of the program, such as specifying a sender account in a new message window.

If you add more than one email account, be sure to enter appropriate values for each account in all of the fields in this window, as all of these settings are account specific.

## Account Name

This is the user-specified name given to an account. Each account should be given a different name. Pick names that are easy to remember and meaningful to you. In the example above, there are two accounts: Primary Account (the main account), and Personal Account (a secondary account).

# Checking Panel

The information you enter in the fields on this panel tells Mailsmith how you want to retrieve your mail.

## POP Server Name

POP stands for Post Office Protocol, which is the protocol the email server uses to communicate with Mailsmith. The POP Server Name is the host name given to the server in lieu of an IP address such as 192.168.0.1, which is understandably easier to remember. For example, if your ISP is named GreatISP.com, then the name of the POP server for that ISP might be something like mail.GreatISP.com or pop.GreatISP.com. Your system administrator or ISP can provide the correct name for your POP server.

## User ID

This is the name used to log on to your account. For example, if your login name is *john_doe* (john_doe@GreatISP.com) you would use *john_doe* as the User ID for this account.

Note: Account names on many systems are restricted to eight characters, so your User ID on such a server might be *johndoe* instead.

## Password

This password controls downloads from the POP server.

The password field allows you to preset the password for each account. If you have more than one account and password, be sure to match the password correctly with the User ID.

## Use APOP

APOP stands for Authenticated Post Office Protocol. APOP helps to protect against unauthorized access to email accounts by avoiding transmission of your password as clear text.

Not all POP servers support APOP. You may or may not be able to use Mailsmith with the APOP Authentication option checked, depending on your POP server. Consult your system administrator or ISP to determine if this feature is available for your email account.

> *TIP: For a technical explanation, you can find a description of APOP authentication in RFC (Request for Comments) 1725, and two methods of authentication specified for POP in RFC 1938.*

## Change Password...

To change the password used to access a server account:

1. Click the Change Password button.

2. Enter a new password in the "Password" field.

3. Enter the exact same password in the "Confirm" field.

4. Press the OK button.

If the new password cannot be confirmed, Mailsmith will alert you that the conformation password is not the same as the new password.

The rest of the buttons in the Email Accounts window are configuration parameters.

- **Connect at Startup**—This option instructs Mailsmith to login to the specified email account and check for new message whenever Mailsmith is launched.

- **Check for Mail every __ [Minutes, Hours, Days]—**This option lets you set a schedule for downloading mail. Mailsmith will log into the specified POP server(s) and download mail.

- **Leave Mail On Server—**Mailsmith uses this setting to determine whether  mail messages (and enclosures) should be left on the server or deleted from the server once they have been downloaded. Deleting messages after downloading saves space on the POP server, and prevents the same messages from being transferred on subsequent downloads. Here are some situations in which you might want check Leave Mail On Server temporarily:

   - Shared Mail Accounts—If you are using a business account that is receiving messages for several people, you may wish to preserve the mail spool on the POP server so that other people in the company can retrieve their messages.

   - Offsite Downloads—If you are downloading from another location, such as a friend's house or a conference, you might just want to read the messages, without deleting them from the server. That way, when you return home, you can download them onto your local drive without having to find a way to move the files from the friend's computer or the laptop used at the conference to the regular location.

- **Don't Download Mail Larger Than  __  K—**Used to set the maximum individual message size to be downloaded when an account is checked for new email.

   This setting is only available if Leave Mail on Server is off.

   To retrieve messages that are left on the server, turn this setting off and re-download your mail.

## Sending  Panel

The information you enter in the fields on this panel tells Mailsmith how you want to send your mail.

### Sender's  Name

Type your name the way you want it to be displayed (next to your email address)  in the From field, as in "Sender's Name <userid@server.com>".

```
John Doe <john_doe@GreatISP.com>
```

If the Sender's Name field is blank, only your email address will displayed in the From line, as shown in the line below.

```
<john_doe@GreatISP.com>
```

## SMTP Server Name

SMTP stands for *Simple Mail Transfer Protocol.* This is the protocol used to route mail through the Internet from its sender to its destination. The SMTP server is responsible for accepting your outgoing mail and relaying it to its destination. Contact your ISP or system administrator for the name of your SMTP server.

## Default Domain

This is an optional field which enables you to specify a default domain to which your mail should be sent if you do not otherwise specify a domain in the address. For instance, a person who works at Bare Bones Software might choose to specify 'barebones.com' as a default domain, because most of the messages they send go to co-workers who have accounts in the same domain.

## Send at Check

If this option is turned on, Mailsmith will send any queued or unsent outgoing messages when a connection is made with the POP server. This setting is particularly useful when using a dialup connection.

## Reply Address

This field indicates the email address that replies should be sent to. Ensure that the Reply Address field contains a valid email address, or else nobody will be able to reply to your messages.

## Use Signature

When the checkbox is marked, Mailsmith will include the signature file specified in the associated popup menu with each message sent from the account. To use the signature specified in your Internet Config preferences, choose Internet Config from the popup menu.

Signature files are stored as text files in the Mailsmith Signatures folder, located inside the Mailsmith folder. To add signatures to the popup menu, simply put them inside the Mailsmith Signatures folder.

At the bottom of the Email Accounts panel are three buttons which allow you to **Save** new information that you have entered, **Revert** to the previous state of the entry before you began to modify it, and **Make Default**, which sets the active account as your default account (indicated by a checkmark in the account list). **Check Now** instructs Mailsmith to check the selected email accounts for new mail immediately.

> TIP: *The default account is used as the default sending account when you create a new message, or when a filter does an auto-reply, auto-forward, or auto-redirect.*

> TIP: *If you want to manually check a single account (or a few selected ones), just select them in the accounts window and hit "Check Now".*

# Verifying a New Email Account Listing

How do you know if you've set up everything correctly? The most direct way to verify the settings of a new email account listing is to click the **Check Now** button on the bottom left side of the screen.

> TIP: We recommend that you check the Leave Mail On Server setting in the Checking panel while configuring Mailsmith. That way you can be sure that your settings are right without risk of losing any mail.

Once you have set up the first account, and made sure that Mailsmith connects to your server, then you can enter and check messages for more email accounts.

When a connection is established, two arrows will appear next to the name of the account being checked. This symbol indicates the transfer of data is underway. When the download is completed, messages will appear in the Incoming Mail mailbox. (This assumes that there was mail to download in the first place. You may have to send yourself a few test messages to make sure there's something for Mailsmith to process.)

To check the messages you have downloaded, open either the Mail Browser or Mailbox List window. On the left of the Mail Browser window, you'll see the names of the default mailboxes in parentheses (*outgoing mail, incoming mail, trash*), and other mailboxes that you have created. The exact same mailboxes will be displayed in the Mailbox List, as in Figure 3-3.



Figure 3-3: Mailbox List categories for organizing your messages.

# Importing Email from Other Applications with Scripts

The import scripts take advantage of Mailsmith's scriptability and the scriptability of supported email clients to import data.

On the Mailsmith CD-ROM, in the Mailsmith Extras folder, there are scripts for importing sets of mailboxes from Eudora, Emailer and Outlook Express. To import all of the messages contained within any one of these applications, run the appropriate script by launching (double-clicking) on it from the Finder.

## Eudora Import Script Notes

The Eudora import script requires the "BB Commands" scripting addition which is included on the Mailsmith CD-ROM. Make a copy of this file on your hard drive and place it in your Scripting Additions folder (in your System Folder). If Mailsmith is already running, you will need to quit and re-launch before running the script.

After Mailsmith is open, go back to the Finder, and launch the Import Eudora Mail script. The script will open a dialog box which asks which file to import. Select the appropriate file. Mailsmith will then import your Eudora mail into the Incoming Mail mailbox.

## Emailer Import Script Notes

The Emailer import scripts require Emailer 2.0v3. If you are running an older version of Emailer, you will need to update before using the Emailer import script.

## Importing Filters, Addresses, & Other Mailboxes

To import Eudora Filters or Address Books, as well as individual mailbox or spool files from other email applications that use the "mbox" file format (as does Eudora), use the import commands located under the File menu (see Figure 3-4). You may import the following items using the Import menu:

- The Eudora Filters file

- The Eudora Nicknames file

- Individual Eudora mailbox files, or other mailboxes or spool files that use the "mbox" file format

Selecting the Import menu item reveals commands for importing Mail, Filters, and Addresses. To initiate the import, you will need to tell Mailsmith to open the appropriate file.
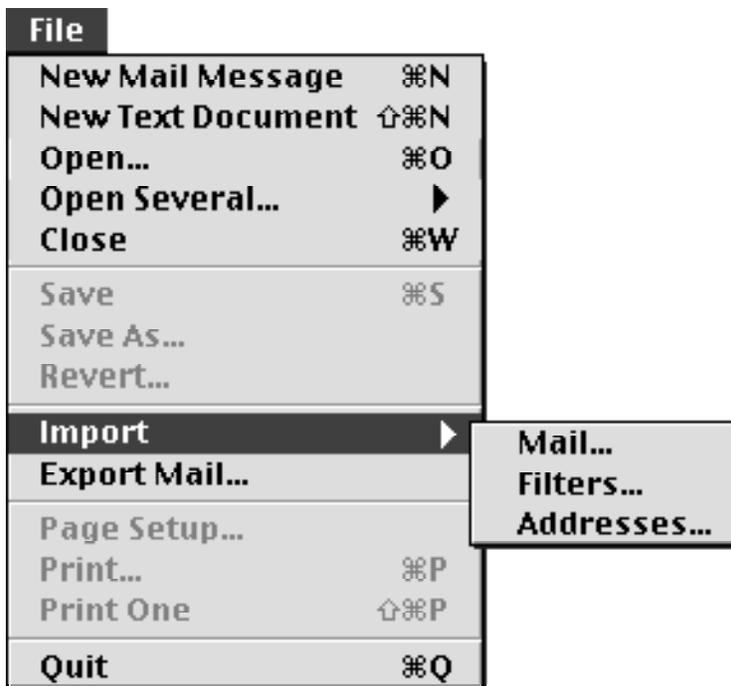
Figure 3-4: Look under the File menu for additional importing options.

# Chapter 7 • Filters

This Chapter describes Mailsmith's filtering functionality.

**In this Chapter**

- About Mailsmith's Filters

- The Filter Process—Explained

- Creating Filters

- Filter Actions

- Attaching Filters to Mailboxes

- Sample Filters

## About Mailsmith's Filters

What is a filter? A filter is a set of conditions, combined with a set of actions, which effects some change on a mail message.

In Mailsmith, there are two ways to approach filtering. For an overview of traditional filters vs. Mailsmith's Distributed Filters™, please refer to the Mail Filters section of Chapter 6.

As you begin to work with Mailsmith's filtering capabilities, there are some important points to be aware of. Filters must be associated with mailboxes. If you create a filter and do not associate it with a mailbox, it will not work (see the last section of this Chapter). Mailsmith's filters are reusable, that is, they can be associated with more than one mailbox. The master list of filters is displayed in the Mail Filters window which is accessed from the Windows menu.

Mailsmith offers you the flexibility to determine the model that will be employed to manage mail. Filters can be used in either a global or distributed manner (or a combination of the two).

Why organize with distributed filters? When filters are organized hierarchically with mailboxes in a manner that mirrors the organization of mailboxes (and data) they become much easier to edit and track than a clump of filters attached to the incoming mailbox.

## The Filter Process

When mail comes down the pipe, it arrives in the incoming mailbox. In this context, "down the pipe" means that the message may have been downloaded from a mail server, or it could have been imported using the command from the Import submenu on the File menu.

Once there, Mailsmith will pass the message by each mailbox in the hierarchy. At each mailbox, any filters which are attached to that mailbox, are executed in order. You can change the order of execution and enable/disable filters for a specific mailbox by using "Get Mailbox Info" to open up the info window for the mailbox, and dragging filters around to re-order them.

The application of a filter is simple: if the message matches the criteria that you specified, then the filter's actions are applied to the message. With respect to the processing of incoming mail, the "Deposit" and "Transfer" actions have special meaning. If a filter deposits a message, then that message will be passed by any mailbox contained *within* the current one, but will *not* be passed by any more mailboxes at the same level as the current one.

For example, given the following organization of mailboxes:

```
(incoming mail)

    Lists

        Late Show News

        TidBITS

    Press Releases

    Bulk/Unknown
```

A filter attached to "Lists" has a Deposit action. So if a message comes in from the TidBITS list, this filter will fire, and the message will drop into the "Lists" mailbox, and will *not* be processed by any filter that is attached to "Press Releases" or "Bulk/Unknown". (It doesn't matter whether the message would have matched any of those filters; they will never see it.)

Once the message has been deposited in "Lists", then the children (sub-mailboxes) of "Lists" get a crack at it. So if the message is from TidBITS, it will drop into the TidBITS mailbox, and the filters attached to the "Late Show News" mailbox will likewise never see the message.

The other action with special meaning is "Transfer". When a Transfer action fires, the message becomes ineligible for further filtering, period. So if a filter attached to "(incoming mail)" transfers a message, say, to "Bulk/Unknown", then that message will receive no further attention by the automated filtering system.

Note: In Mailsmith 1.0, there is no provision for manually invoking either the filtering subsystem or an individual filter.

Now suppose you have a spam filter attached to "(incoming mail)", which transfers spam to the "Bulk/Unknown" mailbox. Once that happens, the message will not be seen or filtered by any other mailbox, *including* the mailbox to which it was transferred.

Regarding the order of filtering: there are actually two orders at work here. The 'mailbox order' is the order in which messages are processed by filters attached to specific mailboxes. The only ordering that is assured is that the filters attached to the "(incoming mail)" mailbox get to see the message before the filters attached to any other mailbox; also, filters attached to children of a given mailbox will only see the message if the parent filters perform a Deposit action, and then the children will only see the message after the Deposit has fired.

There is also the order of execution for filters attached to a specific mailbox. Here, you *can* modify the ordering; see the remarks above.

If no ordering is specified, then filters will be applied in the order that they were added to that particular mailbox; because you're unlikely to ever remember this, it's always a good idea to use the Mailbox Info window to check and/or modify the ordering.

The filtering subsystem is set up so that for each mailbox with filters, if one of the filters performs a Deposit or Transfer, then any subsequent filters' attempts to Deposit or Transfer the message will be ignored. Likewise, if you made the mistake of putting multiple Deposit and/or Transfer actions in a filter, only the first such action will be performed; all other deposit/transfer actions will be ignored.

## Points to Remember

If a message never matches against a filter, it will stay in the "(incoming mail)" mailbox. At the same time, though, you could have a filter attached to the inbox which performs a Deposit action, which means that that message would not be seen by any other mailboxes.

Filters are only applied when downloading or importing mail. If you manually move messages in the UI, or from the scripting interface (which amounts to the same thing, because Mailsmith is internally factored, which is really cool to watch if you open the Script Editor and hit the Record button), they will be dropped where you put them.

# Creating Filters

To create a filter, select Mail Filters from the Windows menu (see Figure 7-1). The Mail Filters window displays a list of all existing filters.



Figure 7-1: The Mail Filters window.

The row of buttons along the top of the window allows you to create new filters, open and rename existing filters, and delete filters.

Creating a filter in Mailsmith is easy. The New button opens a dialog box which asks you to name the filter and attach it to a mailbox (see Figure 7-2). You can attach the filter to a mailbox through this dialog box, or by dragging the filter from the Mail Filters window into the Mailbox Info window for the mailbox to which you want it attached.
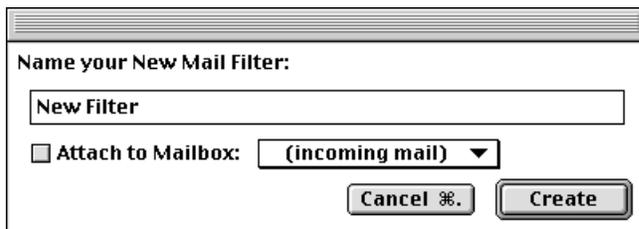


Figure 7-2: Naming a new filter.

Next, click the Create button to configure the filter (see Figure 7-3). Notice that the resulting window is very similar to the Advanced Query window. They function in a similar manner. To add or delete filter criteria, use the buttons at the top of the window. There is no limit to either the number of criteria or mail actions a filter can contain.
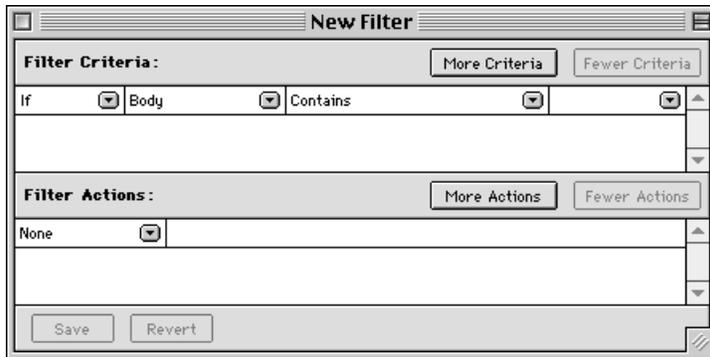


Figure 7-3: The configuration options for a filter.

## Composing Filter Criteria

Building filters using criteria is very similar to building advanced queries. Different options become available in the popup menus associated with the filter criteria, depending on elements used to create the filter.

> *TIP: To get more room in the edit field, just make the window wider (the field will also autoscroll to accomodate more text than the display area).*

The menu on the far right of each filter criteria line contains options for associated settings—this menu changes dynamically to offer the options that fit the criteria defined in each individual line. The Filter Criteria section of the filter configuration window (see Figure 7-4) is broken down into four sections.

> *TIP: The "Deposit" and "Transfer" filter actions have special meaning.*
>
> *If a filter deposits a message, then that message will be passed by any mailbox contained within the current one, but will not be passed by any more mailboxes at the same level as the current one.*
>
> *If a filter transfers a message, it will not be processed by any further filters, no matter where it is transferred to.*

**Filter Criteria:** [More Criteria] [Fewer Criteria]

| If ⏷ | Body ⏷ | Contains ⏷ | ⏷ |

**Condition**

| If |
| If not |

**Part of Message**

| Body |
| --- |
| Subject |
| Date Sent |
| Date Received |
| Priority |
| Label |
| Notes |
| Has Enclosures |
| Has Recipients |
| (any header) |
| From |
| To |
| CC |
| BCC |
| Reply To |
| (any recipient) |
| Read |
| Answered |
| Forwarded |
| Redirected |
| Deleted |
| Sent |

**Search Method**

| Is Equal to |
| --- |
| Is Not Equal to |
| Is Less Than |
| Is Less Than or Equal to |
| Is Greater Than |
| Is Greater Than or Equal to |
| Contains |
| Does not Contain |
| Starts with |
| Does not start with |
| Ends with |
| Does not end with |
| Matches Grep Pattern |
| Does Not Match Grep Pattern |
| Approximately Matches |
| Does Not Approximately Match |

**Associated Settings**

| Case Sensitive |
| ● Case Insensitive |
| ● Any Match |
| Word Match |

Figure 7-4: The default Filter Criteria options for a filter and the other available menu options.

- **Conditional Menu**—When constructing multi-criteria filters which make use of "and", "or," and "or else", the "and" and "or else" constructors take precedence over "or". "Or else" is essentially equivalent to "and not." The items in the "conditional" popup menu ("If," "If Not," "And," "Or," and "Or else") function as they do in the Advanced Query.

- **Part of Message**—Used to specify the message element to which the criteria will apply. It is identical to that which appears in the Advanced Query window.

  **Search Method**—Sets the search method (Literal, Grep, or Fuzzy) used with each individual criteria, allowing you to use multiple search methods in one filter.

  The menu options correspond to those same methods. The Literal search method options on the pull-down menu include: Is Equal to, Is Not Equal to, Is Less Than, Is Less Than or Equal to, Is Greater Than, or Is Greater Than or Equal to, Contains, Does Not Contain, Starts with, Does not start with, Ends with, and Does not end with.

  The two Grep method options are Matches Grep Patterns and Does Not Match Grep Pattern.

The Fuzzy Search method options are Approximately Matches and Does Not Approximately Match. The accuracy percentage setting becomes available in the associated settings pulldown menu at the far right when one of these options is used in a criteria line.

• **Associated Settings**—Sets the options for case sensitivity, word matching, percent accuracy with approximate matches, priority settings, label settings, and match recipient info. The purpose of the majority of these is self-explanatory. Details on using the match recipient info settings appear below.

> *Match Name or Email Address*—looks for a match anywhere within the name and email address [<u>userID@server.com  (name)</u>]
>
> *Match Email Address*—looks for a match in the email address [<u>userID@server.com</u> (name)]
>
> *Match Name*—looks for a match against the name [userID@server.com  (<u>name</u>)]
>
> *Match User ID*—looks for a match against user ID [<u>userID</u>@server.com (name)]
>
> *Match Server*—looks for a match against server [userID@<u>server.com</u> (name)]

Refer to the behavior chart (Table 7-1) for detailed information on the behavior of the associated settings menu.

## Constructing Complex Filter Criteria

When constructing multi-criteria filters which make use of "and", "or," and "or else," the "and" and "or else" constructors take precedence over "or." ("Or else" is equivalent to "exclusive or.")

As an example, consider a filter composed in the following manner:

> If Subject Contains "cash"
> And Subject Contains "free"
> Or Body Contains "make money fast"
> And To: Does Not Contain "username@company.com"

How does Mailsmith interpret this filter? Like this:

> if ( (subject contains "cash") and (subject contains "free"))
> or ( (body contains "make money fast") and (To: does not contain
> "username@company.com") )

Notice how the two items on either side of the "or" constructor are considered in a block.

# Filter Actions

Filter actions are added via the popup menus in the bottom portion of the window. There is no limit to the number of actions associated with a filter. To add and delete actions, use the "More Actions" and "Fewer Actions" buttons. Figure 7-5 shows the actions available for filters.



Figure 7-5: Filter Actions menu options.

The "Actions" popup menu contains the following options:

- **None**—When this item is selected, there is no action assigned.

- **Set Status**—Sets the Status of messages that match the criteria specified in the accompanying menu.

- **Set Priority**—Sets the Priority of messages that match the criteria specified in the accompanying menu.

- **Set Label**—Sets the Label of messages that match the criteria specified in the associated label popup menu.

- **Set Subject**—Sets the Subject of messages that match the criteria of the string specified in the text area on the right.

- **Reply to Sender**—Creates a reply addressed to the sender according to the options specified in the associated settings menu (Choose File..., Quote Message in Reply, Place Quote at Beginning/End).

- **Reply to All Recipients**—creates a reply addressed to the sender as well as all the recipients of the message (except yourself) according to the options specified in the associated settings menu (Choose File..., Quote Message in Reply, Place Quote at Beginning/End).

- **Forward**—Forwards each message that matches the criteria to the email address entered in the adjacent text area.

- **Redirect**—Redirects each message that matches the criteria to the email address entered in the adjacent text area.

- **Copy**—Copies each message that matches the criteria into the mailbox specified in the popup menu.

- **Transfer**—Transfers each message matching the criteria to the mailbox specified in the popup menu.

- **Deposit**—Deposits each message matching the criteria in the mailbox.

- **Open**—Opens each matching message in an individual window.

- **Print**—Prints each message that matches the criteria.

- **Play Sound**—Plays the selected sound.

- **Notify**—Opens an alert containing the message entered in the text area. If you leave the string blank, Mailsmith will put up a notification alert telling you that "The message '<message subject>' has been processed."

- **Run Script**—Runs the specified AppleScript.

Why and how does this work? The reason is that a message doesn't just stop at the inbox when it comes in. If a message "survives" the inbox (i.e., it doesn't hit a filter in the inbox which transfers it to another mailbox), it will travel down the hierarchy of mailboxes.

# Attaching Filters to Mailboxes

Earlier in the Chapter, we mentioned that filters need to be associated with mailboxes in order to run. This is true for filters intended to function on either a global or distributed basis.

As you consider this, bear in mind that the same filter can be attached to more than one mailbox. There are two alternatives for attaching filters to mailboxes. You can attach them via the checkbox in the dialog box presented at the time of creation, or by dragging them from the Mail Filters window into the Mailbox Info window for the mailbox to which you want a filter attached.

Figure 7-6: The Mail Filters window and the Mailbox Info window.

# Sample Filters

## Example: Global Filter

The first example filter in this chapter is a great starter spam filter (see the Constructing Complex Filter Criteria section). Try setting up the criteria. When you've finished, move on to the Filter Actions section of the window. For now, we'll use just one action, "Transfer," which moves messages that match the criteria to the specified mailbox—in this case, the trash!
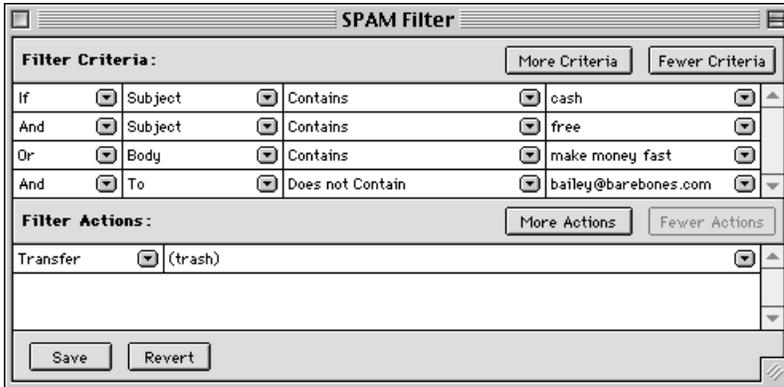


Figure 7-7: A sample global filter that transfers unwanted mail to the trash.

When you're finished, attach this filter to the Incoming Mail mailbox. This is an example of a filter that would be run on all incoming mail—you could consider it a "Global" level filter.

When adding more lines of criteria to this filter, remember to take into account the relative position of the operators in each criteria line. As discussed in the Constructing Complex Filter Criteria section, when building criteria that use the "and," "or," and "or else," the "and" and "or else" constructors take precedence over "or."

"Or else" is equivalent to "exclusive or". This condition, when used with two criteria, will match anything that satisfies one criteria, or the other, but not both of them.

For example, a condition for choosing your dessert of "cookies or else cake" would mean that you can have either cookies, or cake, but not both.

In the specific case of the above spam filter, if you wanted to add more criteria lines that would check for other terms in the subject or body in addition to the already specified criteria, you can just insert them.

## Single Criteria Filter-Global

In most cases your filters will be simpler than the one above. A filter that you might find particularly useful filters email from a "discussion list" into a specific mailbox (see Figure 7-8).

    Criteria: If Any Recipient Contains "mailsmith-talk"
    Actions: Transfer to mailbox "Mailsmith Talk"
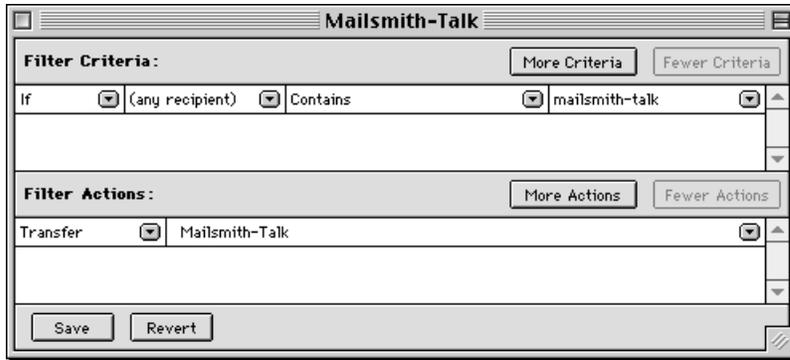
Figure 7-8: A sample single-criteria filter that transfers mailing list mail.

This fairly simple filter, when attached to the incoming mailbox, will filter all mail from the Mailsmith-Talk list into its own mailbox. It is often a good idea to store messages from a list in their own mailbox. This makes it easier to follow discussions, and if you need to look for an old message from the list you know where it is.

## Example: Distributed Filters

So far we haven't seen anything different than is available in any number of other email packages. However, global filters like the one above are really the simplest (and ultimately least powerful) of the filtering technologies in Mailsmith.

Transfer filters like the above "push" or "repulse" mail messages from one location to another. Mailsmith's distributed filters actually "attract" messages.

In order to describe how these work, we'll set up a an example using a hypothetical customer of Bare Bones Software who subscribes to both our Mailsmith-Talk and BBEdit-Talk discussion lists. Now, David (the customer) has two co-workers (Jack and Jill) who also subscribe to and post messages to each of these lists. David needs to filter all the mail to each of these lists into separate mailboxes, in addition, he would like to keep all of the mail that each of his co-workers sends in a mailbox specific to the list and to the person.

David starts off by creating four simple filters (one for each list and one each for Jack and Jill). He also sets up nine mailboxes (one for each list, one for work related material, and nested mailboxes in each for Jack and Jill). Here is what the Filter List and Mailbox List look like at this point.
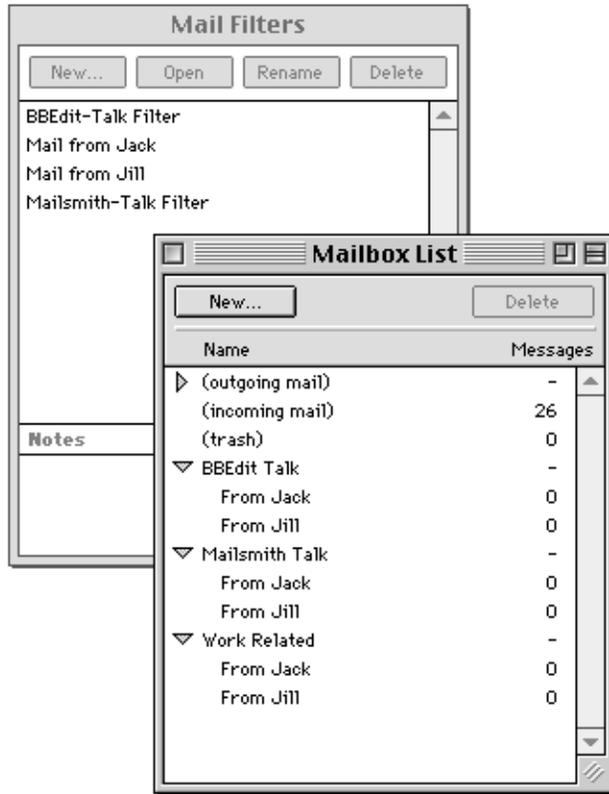
Figure 7-9: Creating distributed filters.

How is David going to filter mail into nine mailboxes with just four simple filters? The key lies in the "attractive" nature of the filters. Here are the four filters:

<pre>
1) Criteria: If any recipient contains mailsmith-talk      Action:  Deposit
2) Criteria: If any recipient contains bbedit-talk         Action:  Deposit
3) Criteria: If From contains jack@the-hill.org            Action:  Deposit
4) Criteria: If From contains jill@the-hill.org            Action:  Deposit
</pre>

Next, David attaches the first and second filters to the Mailsmith-Talk and BBEdit-Talk mailboxes respectively and then attaches the third filter to each mailbox named "From Jack" and the fourth filter to the mailboxes named "From Jill."

Why and how does this work? The reason is that a message doesn't just stop at the inbox when it comes in. If a message "survives" the inbox (i.e., it doesn't hit a filter in the inbox which transfers it to another mailbox), it will travel down the hierarchy of mailboxes. So, for instance, if a message which was sent from Jack to the Mailsmith-Talk mailing list comes in, it will first run through the filters attached to the inbox. Since in this example we don't have any such filters, on the incoming, outgoing, or trash mailboxes, the message will then move on to the BBEdit-Talk mailbox (the first mailbox in the hierarchy below the inbox).

Since there are no filters on the BBEdit-Talk mailbox which will "deposit" or "attract" the message, it moves on to the next mailbox, in this case Mailsmith-Talk. Once the message arrives at the Mailsmith-Talk mailbox it triggers criteria #1 above (deposit in Mailsmith-Talk). Since the message triggered a deposit filter on Mailsmith-Talk, it will *not* move on to "Work Related", but instead begins to traverse the Mailsmith-Talk sub-hierarchy.

So, after being acted on by any filters attached to Mailsmith-Talk, the message moves on to mailbox "From Jack" within mailbox "Mailsmith-Talk" where it triggers criteria #3 above. Since this mailbox has no "children" or sub-mailboxes, the message will stay here.

## Additional Examples

We've set up some additional sample filter scenarios to help you get started. You can copy or modify any of these filters to suit your needs.

### Filtering for Urgent messages

This scenario is set up to look for Urgent messages in two different ways so you can read them before going onto the rest of your mail. We'll filter according to priority level and according to specific terms or attributes within messages.

Since not all messages will originate from a mail client with priority level settings, you'll probably want to do both. Figure 7-10 shows a filter with several criteria in the window titled 'Urgent' on the right.
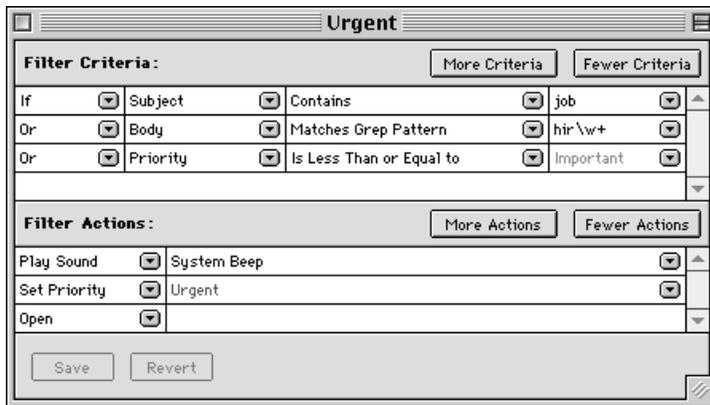


Figure 7-10: A sample filter to help get your attention for urgent messages.

This example uses three filter criteria. We'll take a look at these in detail, then show a slightly different example.

- The first filter criterion is very straightforward. It looks for any message with a Subject line that includes the word *job*. This will work if you know for certain that a message coming through will have the word job. If you think the alternate *employment* might be used, you might want to add another line for that.

- The second criterion uses grep to search the text for any word beginning with 'hir' such as hiring, hired, or hire. Detailed information about grep searches and queries can be found in Chapter 9. Remember to be cautious in your use of AND and OR. If we had used AND in this example, then only messages with a subject line containing job AND a word starting with "hir" would be filtered into the Urgent pile, and those which contained one or the other would be excluded, which probably isn't what you want.

- The third filter criterion looks at Priority settings. In this case, a message might only be flagged as IMPORTANT by the sender (such as a potential employer), but might be URGENT to the receiver, if he or she is anxiously awaiting news about a job. We've set this criterion up to catch any message marked Important or Urgent.  You can assess their importance further by scanning through the messages once they've been identified and moved to the desired location.

- Now that we've set up criteria to collect all of our urgent messages, we need to assign a filter action. In this case, we're trying to make these messages stand out so we've chosen to play a sound (System Beep), change the priority to Urgent, and open the message.

## Filtering for Unwanted Messages
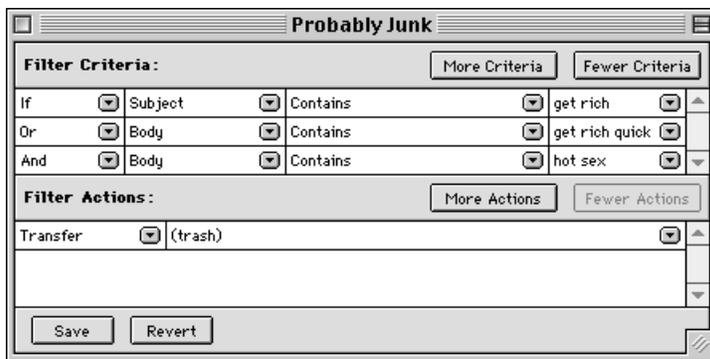


Figure 7-11: This example shows another way some of the junk mail can be filtered so that it can be separated from the email you want to read.

In this example, we've set up filters to separate out the bane of the Internet— electronic junk mail. Unfortunately, there's far too much of it and most of it is annoying as well as time- and money-consuming.

Mailsmith can help cut down the amount of time you waste wading through and deleting these unnecessary and unwanted missives. The above filter has three simple criteria, though you may wish to add more once you have a better idea of how to use filters.

- The first criteria line separates out all messages in which the subject line includes the words "get rich." On the off chance that  you may actually get a *legitimate* message with this in the title, bear in mind that a filter is intended to categorize your mail without harming it in any way. You always have the option of refiling a message in another section.

- The second criteria line looks for "get rich quick" in the body of a message. Most junk email isn't this blatant, but some of it is, and you might as well filter these out right away and not waste your time on them. If those get rich schemes really worked, do you think everyone would be telling you about it? No way! They'd keep the information to themselves!

- Many people are annoyed by the numerous junk email messages inviting you to visit sex sites on the Web. If you want to filter out such junk mail, this criterion will catch at least some of it.

- After composing the criteria lines, we added the filter action to transfer these messages to the trash.

There are many other types of messages that can be filtered but the above examples show ways of sorting messages you *do* want and messages you *don't* want. The rest is up to you.

# Chapter 8 • Searching

This Chapter describes Mailsmith's searching capabilities.

**In this Chapter**

- Mailsmith Search Methods

- Searching Open Messages (or Text Files)

- Searching Stored Mail

## Mailsmith Search Methods

Mailsmith has two different search facilities. One is used to search open messages and text files and the other is specific to searching stored mail (or the database that holds your messages). Commands for the different facilities are located on two different menus— Search and Mail.

To search for material within open messages and text files, use the commands listed under the Search menu. To search stored mail, use the Simple Query and/or Advanced Query commands, found on the Mail Menu.

Both facilities offer three different search methods which are described below.

Any one of three different search methods or mechanisms can be employed when conducting either window searches or stored mail queries.

- **Literal**—Returns literal matches of the specified information (search string).

- **Grep**—Enables you to use special characters and patterns to find material that meets specified conditions rather than a particular string of text (like that returned in the literal method). For a more detailed treatment of grep as a topic, refer to Chapter 9.

- **Fuzzy (or Approximate) Match**—The Fuzzy (or Approximate) method enables you to search for approximate matches to the specified search string within a percentage range. The percentage of accuracy used will vary widely depending on the uniqueness of the search string.

  This type of search is particularly useful in the context of an email client. It is not difficult to imagine a situation in which you might need to find a message from a person whose name and email address you are unsure of.

# Searching Open Messages

The Search menu commands are specific to window searching or searches that are to be conducted within messages or text files. This command is not used to query or find messages within mailboxes. A description of the Search commands appears below.



Figure 8-1: Options on the main Search Menu.

## Find in Window...

This section describes the basic steps for searching and replacing text in a window. To search and replace text in the active window, follow these steps:

1. Choose Find in Window... from the Search menu. Mailsmith opens the Find in Window dialog box. The following figure illustrates the basic functions.

2. Type the information you're looking for in the Search For text box. You can use special characters in the Search For text box to search for tabs, line breaks, or page breaks. See "Special Characters" later in this section.

3. Type the replacement information (if any) in the Replace With text box.

4. Select any options in the middle part of the dialog box that you want to apply to your search. To learn more about these options, see the next section of this Chapter, "Search Options."
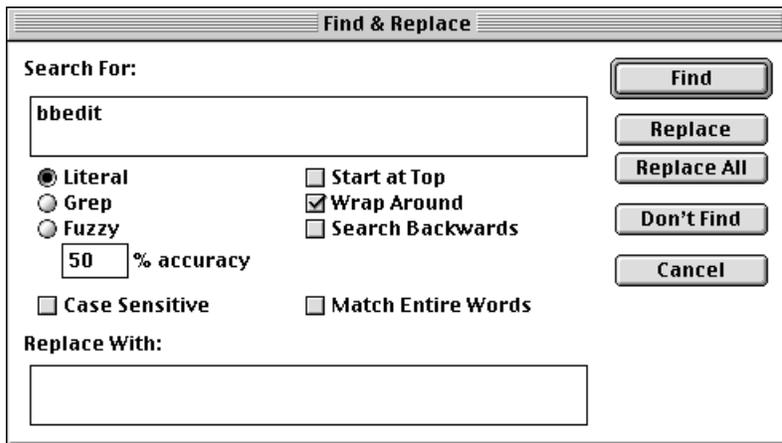
Figure 8-2: Find in Window offers a variety of options for setting the method and parameters of a search.

5. Click one of the buttons along the right side of the dialog box.

- **Find**—Finds the first occurrence of the text in the active window.

- **Replace**—Finds the first occurrence of the text in the active window and replaces it with the replacement string.

- **Replace All**—Replaces every occurrence of the search string in the active window with the replacement string.

- **Don't Find**—Saves the settings of the Find dialog box (including search and replacement strings) without executing a search.

- **Cancel**—Doesn't do the search and restores the settings of the dialog box.

Mailsmith selects the search string in the active window if the search was successful. Once Mailsmith finds your text, you can use the other commands in the Search menu to further your search. Chapter 12, Mailsmith Reference—Menu Options, describes each of the remaining commands in the Search Menu.

## Search Options

The search options in the Find in Window... dialog box let you control how Mailsmith searches your document for the search string.

- **Search Method Setting: Literal/Grep/Fuzzy**—Used to specify which method Mailsmith should conduct the search in. The default for this setting is Literal. Refer to the beginning of this Chapter for more information on Search Methods.

- **Start at Top**—When this option is selected, Mailsmith always starts searches from the beginning of the document.

- **Wrap Around**—When this option is selected, Mailsmith continues searching from the beginning of the document if a match isn't found (or from the end of the document if searching backwards). Otherwise, Mailsmith stops searching with it reaches the end (or the beginning if searching backwards) of the file.

- **Backwards**—When this option is selected, Mailsmith searches from the insertion point to the beginning of the file. Otherwise, Mailsmith searches from the insertion point to the end of the file.

- **Case Sensitive** —When this option is selected, Mailsmith treats upper and lowercase instances of a letter as different letters. Otherwise, Mailsmith treats upper and lowercase versions of a letter as if they were the same.

- **Match Entire Words**—When this option is selected, Mailsmith matches the search string only if it is surrounded in the document text by word-break characters (white space or punctuation). Otherwise Mailsmith matches the search string anywhere in the text. For example, a search for "pop" would stop at the words *popsicle, popcorn* and *Popeye*, unless you have Match Entire Words selected.

## Searching with Special Characters

You can use the special characters found in Table 8-1 to search for non-printing characters:

| Character | Matches… |
|---|---|
| \r | line break (return) |
| \n | Unix line break (line feed) |
| \t | tab |
| \f | page break (form feed) |
| \\ | backslash (\) |

Table 8-1: Special characters used in searches.

# Searching Stored Mail

The Mail menu commands Simple Query and Advanced Query are used to find stored messages. These commands are not used to search open (or active) windows or text files.

Simple Query provides an interface for entering a search string, selecting a mailbox or group of mailboxes to search within, and some options for conducting the search. Advanced Query allows you to develop a search based on multiple criteria with a variety of options. Details on using both Simple Query and Advanced Query appear below.
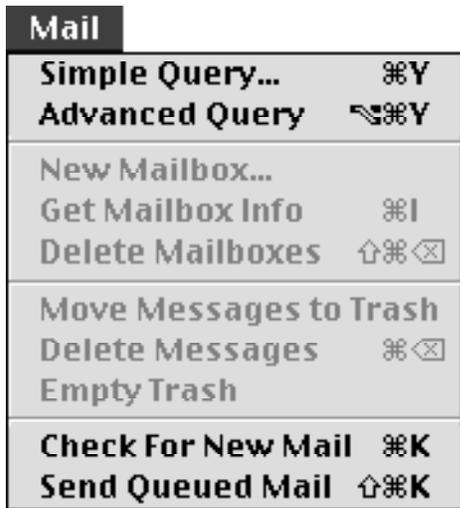


Figure 8-3: Options in the Mail Menu.

## Simple Query...

Simple Query is another option for finding information in stored messages.
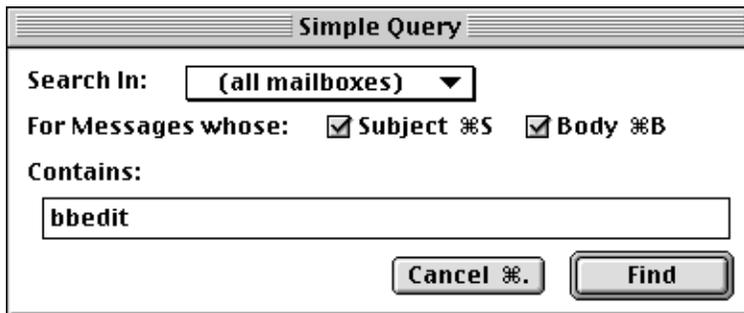


Figure 8-4: Options for quickly finding messages with specific attributes.

To set up a Simple Query, select the mailbox(es) in which you want the search to run. Mark the Case Sensitive checkbox if desired, and type in the information you're looking for. Simple Query provides options for searching in either the subject and/or body of the message.

Click Find to execute the search.

## Advanced Query

The Advanced Query function enables you to conduct a search through all of your stored mail based on an unlimited number of criteria. Each of the options in the Advanced Query window is explained in the next section of this Chapter, Advanced Query Options.

This section describes the basic steps for building Advanced Queries. To compose a Query:

1. Choose Advanced Query from the Mail menu. Mailsmith opens the Advanced Query window.

2. Use the pulldown menus in the search criteria area to set up the context of your search. Each of the menu options is explained in detail in the Advanced Query Options section. After setting up the criteria, type the search string in the rightmost box. You can use special characters in the text box to search for tabs, line breaks, or page breaks (see the "Special Characters" area of the previous section).

3. If you would like to add additional search criteria, click the More Criteria button and repeat step two as needed until you are ready to run the search.
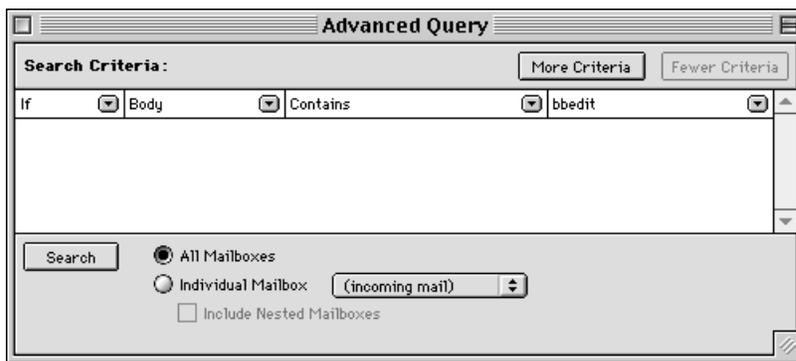


Figure 8-5: The Advanced Query Window.

4. Tell Mailsmith which mailboxes to search by using the radio button and checkbox settings to indicate either all mailboxes or a single mailbox (and optionally all of the sub-mailboxes contained within it).

5. Click the Search button to execute the search.


## Advanced Query Options

Advanced Queries are built using popup menus which allow you to select a condition, part of message, and search method. Different options become available in the popup menus associated with the search criteria, depending on elements incorporated in the search. See Figure 8-5 (behavior chart) for an overview of how the criteria parts interact.

The menu on the far right contains options for associated settings—this menu changes dynamically to offer the options that fit the criteria defined in each individual line.

- **Condition**—Used at the beginning of each criteria clause; the menu will provide If, If Not, And, Or, and Or Else options—depending on a line's position in the sequence of criteria being used to build the search.

- **Part of message**—Used to specify the message element to which the criteria will apply.

- **Search Method**—Sets the search method (Literal, Grep, or Fuzzy) used with each individual criteria, enabling you to use multiple search methods in one query. In Window searching (discussed in the first part of this Chapter), these options are presented by radio buttons.

  The menu options correspond to those same methods. The Literal search method options on the pulldown menu include: Is Equal to, Is Not Equal to, Is Less Than, Is Less Than or Equal to, Is Greater Than or Is Greater Than or Equal to, Contains, Does Not Contain, Starts with, Does not start with, Ends with, and Does not end with.

  The two Grep method options are Matches Grep Patterns and Does Not Match Grep Pattern.

  The Fuzzy Search method options are Approximately Matches and Does Not Approximately Match. The accuracy percentage setting becomes available in the associated settings pulldown menu at the far right when one of these options is used in a criteria line.

- **Associated Settings**—Sets the options for case sensitivity, word matching, percent accuracy with approximate matches, priority settings, label settings, and match recipient info. The purpose of the majority of these is self-explanatory. Details on using the match recipient info settings appear below.

  *Match Name & Email Address*—looks for a match anywhere within the name and email address [<u>userID@server.com  (name)</u>]

  *Match Email Address*—looks for a match in the email address [<u>userID@server.com</u> (name)]

  *Match Name*—looks for a match against the name [userID@server.com  (<u>name</u>)]

  *Match User ID*—looks for a match against user ID [<u>userID</u>@server.com (name)]

  *Match Server*—looks for a match against server [userID@<u>server.com</u> (name)]

  Refer to the behavior chart (Figure 8-6) for detailed information on the behavior of the associated settings menu.

- **All Mailboxes**—When marked, Mailsmith queries all mailboxes for the search criteria.

- **Individual Mailbox**—When marked, Mailsmith queries the mailbox selected in the adjacent popup menu. If the Nested Mailboxes option is checked, Mailsmith will query any mailboxes contained within the selected mailbox.

## Constructing Complex Queries—Precedence of Conditions

When constructing complex queries that use "and," "or," and "or else," the "and" and "or else" conditions take precedence over "or." "Or else" is essentially equivalent to "and not." As an example, consider a query composed in the following manner:

If Subject Contains "cash"
And Subject Contains "free"
Or Body Contains "make money fast"
And To: Does Not Contain "username@company.com"

How does Mailsmith interpret this query? Like this:

 if ( (subject contains "cash") and (subject contains "free"))
 or ( (body contains "make money fast") and (To: does not contain
 "username@company.com") )

Notice how the two items on either side of the "or" constructor are considered in a block.


## Advanced Query Results

Mailsmith displays the results of advanced queries run across multiple mailboxes in a three-paned results browser, which functions like the Mail Browser—except that it only displays mailboxes containing messages that match the search criteria. The results of queries run on one mailbox appear in a double-paned browser, similar to a single Mailbox window. Both types of result browsers will contain the words "Query Results" in the title bar.