



SmarterMail Sync Help

Help Documentation

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SmarterMail Sync is only available for SmarterMail Enterprise Edition 3.1 and higher

SmarterMail Sync is an on-demand synchronization tool. After installing it, a toolbar will be added to your copy of Microsoft Outlook that will allow you to easily synchronize with SmarterMail whenever you need.

SmarterMail Sync uses port 80 (HTTP) to connect to your SmarterMail server on the internet, then uses internal methods to synchronize the information with Outlook. In most cases, this process is completely automatic. ' If a conflict occurs (for example, if an item was edited on the web and in Outlook since the last sync), you will be asked how to handle the conflict.

[SmarterMail Sync Requirements](#)

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The requirements of SmarterMail Sync are minimal, so that it can coexist with other applications on the same computer. Please note there are now two versions of SmarterMail Sync for Microsoft Outlook. One version is for Outlook 2000 only, and the other is for Outlook 2007, XP, and 2003 users.

- Windows 2000, Windows XP, Windows 2003, or Windows Vista (all versions)
- Microsoft Outlook 2007, XP, 2003 and 2000
- Microsoft .Net Framework 2.0 (available from Windows Update)
- RAM: 256mb
- CPU: PIII 500
- DISK: 30 Megs

In general, the Outlook connector of SmarterMail Sync will add about 10 MB of memory usage to what Outlook uses on your computer without SmarterMail Sync.

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Product and Component Acknowledgements

No external components were used in the SmarterMail Sync product.

Outlook Integration

Configuring Accounts for Synchronization

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Before you can synchronize any SmarterMail accounts with Outlook using SmarterMail Sync, you must first set them up in the sync tool. This will provide the tool with the information it needs to connect to your SmarterMail account(s) online.

To manage your accounts, after installing the sync tool, click on the SmarterMail Sync toolbar item, and choose Account Settings from the menu.

Accounts need the following information:

- Name - Enter a friendly name to identify this account.
- SmarterMail URL - Type the full URL of your SmarterMail webmail interface into this dialog. For example, <http://mail.example.com>
- Email Address - Enter your full email address.
- Password - Type the password for your SmarterMail account.
- Synchronization - Check the boxes for the items you wish to synchronize. If you wish to sync to a non-default calendar, task list, or contact list, click on the "..." button next to it.

You can use the Test button to ensure that the connection works, and use the Next button to store the information.

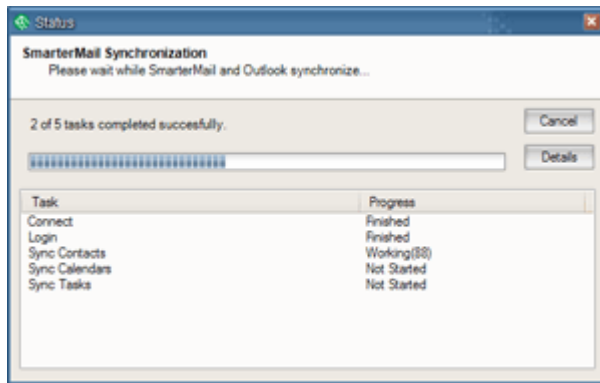
Terms Used

URL - The Uniform Resource Locator is an address that links to a web page or web server that is usually entered into the top of a browser.

Web Interface - The point of access for administrators and end users to the Mail Server via browser.

Synchronizing Accounts

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To begin synchronizing an account, click on the Synchronize button in the toolbar and choose the account name you want to synchronize. The accounts that show up in the drop down list are the same ones you add through the Account Settings dialog.

The synchronization process will begin, and a dialog will appear showing you the progress of the operation. Once the process is completed, the dialog will disappear, similar to how Outlook operates during Send/Receive.

If a conflict occurs, a dialog will appear allowing you to resolve it. For more information, see the help topic Resolving Conflicts .

Resolving Conflicts

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In the course of synchronizing accounts, conflicts may occur. For example, if you update a contact in Outlook and in SmarterMail, the changes may conflict with one another. In that case, a dialog will appear asking you to resolve the conflict.

In the conflict dialog, choose whether you wish to keep the SmarterMail item, or the Outlook item by checking the corresponding radio button. In some cases, a dropdown may appear next to the Outlook item if there are multiple matches in Outlook.

Data in this dialog is color coded to help you identify information more easily. Definitions of what the color coding means appears in the table below:

Black	No conflict
Green	Information that is contained in one record, but not the other
Red	Information that is different between the two records

If you wish to ignore the conflict, click on the Skip button. However, if you choose to ignore a conflict, you will be prompted about the contact later.

If this is a new contact, and doesn't match one of your existing contacts in Outlook, click on the New button.

Troubleshooting

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The items below will help you resolve the most common causes of trouble with the SmarterMail Sync application.

SmarterMail Sync not licensed

A license must be purchased and activated on each email domain to which you wish to sync. Contact your domain administrator for assistance with this. SmarterMail 3.1 or higher is required to be installed on your email domain to use the sync tool.

If you are the domain administrator, you can find information on licensing SmarterMail Sync within the SmarterMail Web Interface in the Domain Settings menu.

SmarterMail Sync license has expired

SmarterMail Sync is licensed per email domain on an annual basis. This allows you free upgrades as long as your license remains active. If you see a notice that your license has expired, contact your domain administrator and have them log into the SmarterMail interface to renew the domain license.

Connection problems when synchronizing

Follow through some of the steps below to help resolve connection issues:

- Check to see if you have an active internet connection by going to a well-known web site, like google.com or amazon.com. If these fail, contact your ISP.
- Check to see if you can log into your SmarterMail account through a web browser. If not, contact your domain administrator.
- In SmarterMail, click on Help -> About SmarterMail to verify that the version number is at least 3.1.xxxx
- Ensure that the URL you entered to get to your webmail is the same as that used for the account you set up in SmarterMail Sync.

SmarterMail Sync Help

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Welcome to the SmarterMail Sync Help System. On the left you can find various topics that will help you use and understand the product. Above, you can find links that will allow you to search this Help System, or you may alternatively visit our Community Forums, as they are excellent sources of information from other SmarterMail users.

Common Help Topics

- Configuring accounts to be synchronized
- Synchronizing accounts
- Resolving Conflicts

What is SmarterMail Sync?

SmarterMail Sync is a desktop utility that allows you to quickly and easily synchronize information from Outlook with an active SmarterMail account on the internet. Using this utility, you can synchronize:

- Contacts
- Appointments
- Tasks
- Notes (Outlook only)

Currently, SmarterMail Sync runs on Outlook 2003, Outlook XP, and Outlook 2007. Your email server must be running SmarterMail 3.1 or higher to use this utility.

Getting Started

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This help topic concentrates on how to get SmarterMail Sync up and running, and explains the best practice for installing the product for the first time.

- Install the product
- Add an account to synchronize
- Synchronize the accounts

Install the product

Run the installation file to install SmarterMail Sync on your desktop. SmarterMail Sync will automatically integrate itself into Microsoft Outlook. The latest versions of SmarterMail Sync is available from www.smartertools.com

	Download and install SmarterMail Sync.
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Add an account to synchronize

From within Microsoft Outlook, click on the SmarterMail Sync toolbar item and choose Account Setup. Add all necessary information about the account you want to synchronize with. ([more info](#))

	Add an account to SmarterMail Sync.
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Synchronize the accounts

After setting up the account(s), click on the synchronize toolbar item and choose the account you wish to synchronize with. If conflicts arise, please refer to the online help to learn how to resolve them. ([more info](#))

	Synchronize the account(s).
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SmarterMail Sync Frequently Asked Questions

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SmarterMail Sync keeps telling me that it is unlicensed, or that the license has expired. What do I do? Contact your domain administrator to have them purchase and install a license for SmarterMail Sync on your email domain. Since the licensing is an annual charge, your administrator will have to renew the license every year.

How do I resolve connection issues or synchronization problems? Please refer to the Troubleshooting help topic in the online help.

Release Notes

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Version 1.1.2711 (6/4/07)

- CHANGED: Separate version for Microsoft Outlook 2000 only.
- CHANGED: Upgraded version for Microsoft Outlook 2007, XP, and 2003 users. This version runs on the .Net 2.0 framework for improved performance.

- ADDED: SmarterMail Sync for Pocket PC 2005.
- ADDED: SmarterMail Sync for SmartPhones running Windows Mobile 5.