



# Outlook Integration

Help Documentation

# Outlook Integration

## Configuring Accounts for Synchronization

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

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.

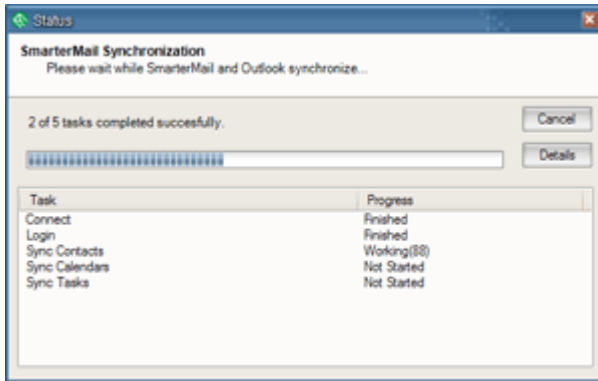
### Terms Used

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.