

# IceWarp Outlook Sync User Guide

Version 12



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## CONTENTS

<b>Contents .....</b>	<b>2</b>
-----------------------	----------

<b>Installation.....</b>	<b>8</b>
--------------------------	----------

---

Installer.....	8
Required software .....	8
Installation step by step.....	8
Step 1 – Language .....	8
Step 2 – Who will be able to use Outlook Sync on the computer .....	9
Step 3 – Required packages .....	10
Step 4 – Profile.....	11
Step 5 – Automatic configuration (SmartDiscover).....	14
Step 6 – License .....	15
Step 7 – Profile properties .....	16
Step 8 – Incoming server configuration .....	17
Step 9 – Outgoing server configuration .....	18
Step 10 – Incoming POP3 server configuration for groupware only profile .....	19
Step 11 – Finishing the installation process .....	19

<b>Outlook Sync Controls.....</b>	<b>20</b>
-----------------------------------	-----------

---

Outlook Sync without profile.....	20
Outlook sync with profile.....	20
Tools.....	20
Maintenance.....	25

<b>Outlook Sync settings brief description.....</b>	<b>25</b>
-----------------------------------------------------	-----------

---

Login credentials.....	26
Advanced .....	28
Synchronization .....	30
Appearance.....	32
License and Updates.....	34
Logs.....	35
About .....	36

<b>Using Outlook Sync in common situations .....</b>	<b>37</b>
------------------------------------------------------	-----------

---

Folder structure synchronization.....	37
---------------------------------------	----

What is folder structure .....	37
How to control folder structure synchronization.....	38
Manual initiation of folder structure synchronization .....	38
Items synchronization .....	38
What is item.....	38
Item synchronization types.....	39
Selecting folder for standard synchronization and inheritance .....	39
How to control items synchronization .....	40
Manual initiation of items synchronization .....	40
Synchronization of special folders .....	41
Ignore list .....	42
Sharing your folder or account to someone else.....	42
Sharing Folder .....	42
Sharing Account .....	47
How to stop sharing your folder or account to someone else.....	48
Someone is sharing his/her folder or account to you.....	48
Removing shared folder or account.....	50
Free/Busy.....	51
Setting Global Free/Busy link .....	52

## **Useful features of Outlook Sync ..... 53**

---

Global address book .....	53
Adding contact folder to address book.....	54
Sorting address book entries .....	54
SIP calls through the server .....	55
How to make a call.....	56
How it works .....	56
Read receipts handling .....	57
How to enable read receipt handling.....	57
Editing read receipt text .....	58
Provisioning system .....	59
View of the administrator .....	59
View of the Outlook Sync user .....	59
Notification center.....	60
Current situation .....	60

Session log .....	61
Ignored items .....	62
Automatic updates .....	62
View of the administrator .....	62
View of the Outlook Sync user .....	63
<b>Managing connection certificates .....</b>	<b>65</b>
Trusted connection.....	65
Untrusted connection.....	65
Removing certificate.....	67
<b>Profile manager .....</b>	<b>68</b>
Starting profile manager from Outlook .....	68
Starting Profile manager via link.....	68
Step 1 – Profile manager welcome page.....	69
Step 2 – SmartDiscover .....	70
Step 3 – Profile properties .....	71
Step 4 – Configuration .....	72
Step 5 – Progress window.....	75
Step 6 – New profile summary.....	76
<b>License.....</b>	<b>77</b>
Online activation.....	77
Step 1 – Activation key.....	77
Step 2 – Activation tab.....	77
License troubleshooting.....	78
Offline activation .....	78
Step 1 – Registering and getting license.xml .....	78
Step 2 – Entering license offline.....	79
<b>Uninstallation .....</b>	<b>80</b>
Step 1 – Selecting mode (uninstall).....	80
Step 2 – Finish .....	81
<b>Troubleshooting.....</b>	<b>82</b>

Outlook cannot send anything out .....	82
I cannot receive items from the server .....	82
Outlook Sync and antivirus .....	82
I cannot receive events with attachments from the server.....	82
Outlook is trying to send message but outbox is empty.....	82
SmartDiscover is not working .....	83
Windows Vista installation issue .....	83

## **Advanced notes ..... 84**

---

What is running on port 5110 and why .....	84
Used protocols and ports .....	84
IMAP (Incoming connection) .....	84
SMTP (Outgoing connection) .....	84
POP3 (Incoming connection) .....	84
HTTP (Supportive protocols).....	84
WebDAV (Attachments retrieval) .....	85
Prioritized queue .....	86
Adding a POP3 account to Outlook profile .....	86
Step 1 – Add new POP3 account.....	86
Step 2 – Outlook Sync bind profile.....	88
Command prompt run .....	89
Mass installations .....	89

## **Appendices ..... 90**

---

Appendix A – Conditions.....	90
Appendix B – Actions .....	93
Appendix C – Ports.....	96

## **Acknowledgment .....Error! Bookmark not defined.**

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## INSTALLATION

This chapter lists installation pre-requisites and details step-by-step installation procedure.

### INSTALLER

The first step is to decide what installer you should use. If you are not installing Outlook Sync via GPO, always prefer EXE. For mass installations use the MSI installer. If you use EXE installer, it allows you to choose a type of installation and it is also able to create profile on demand.

*Always use EXE installer, MSI is intended for mass installations only.*

### REQUIRED SOFTWARE

- Microsoft Windows XP Service Pack 3, Vista, 7, 8, 8.1 or 10 in 32bit or 64bit versions, server operating systems are not supported, except the Terminal Services installations.
- Microsoft Outlook 2007, 2010 or 2013 in 32bit or 64bit versions.

### INSTALLATION STEP BY STEP

This chapter applies to EXE installer. It should get you through the most common scenarios of installation.

#### STEP 1 – LANGUAGE

Outlook Sync's installer detects your language from locales set in Windows. You may change installer language, and of course language of Outlook Sync later any time.

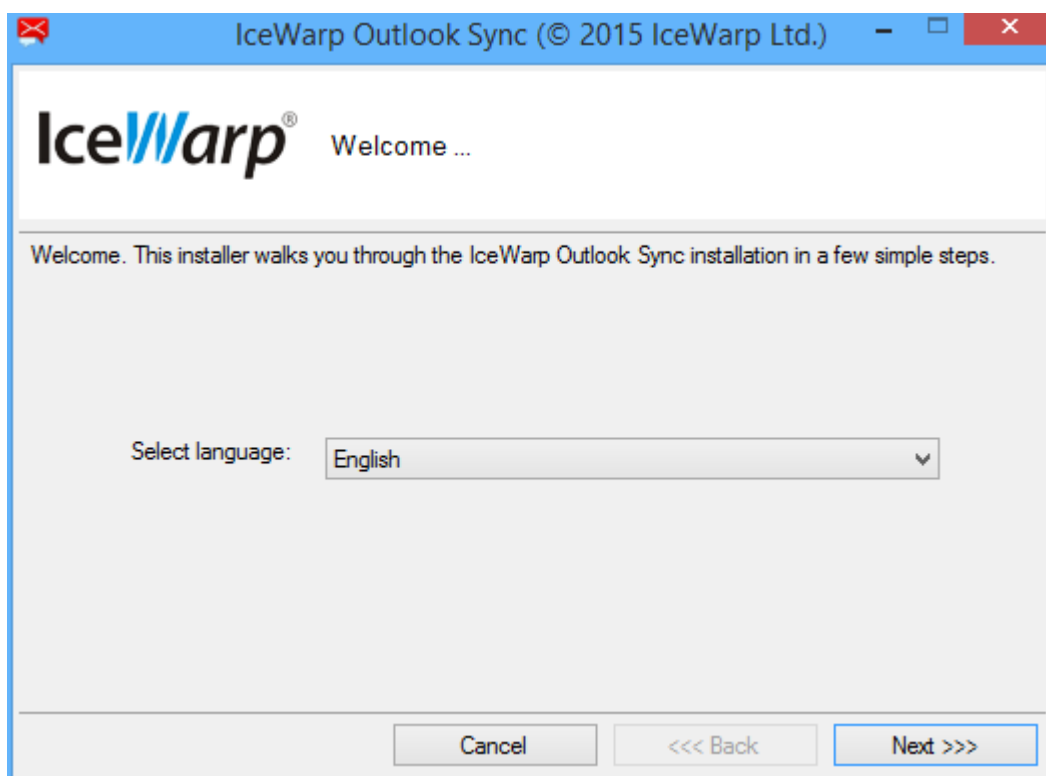


Figure 1 – Welcome (Installer page)



On the Welcome page, select the installation and IceWarp Outlook Sync language and click the Next button. As soon as you click on Next button, you will see “Application license” page. You need to accept the license agreement to continue with the installation.

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## STEP 2 – WHO WILL BE ABLE TO USE OUTLOOK SYNC ON THE COMPUTER

On your Windows, you have your personal account. In the office, you are probably logging in with your credentials. In some cases there might be more accounts, for example if your computer is shared amongst more users.

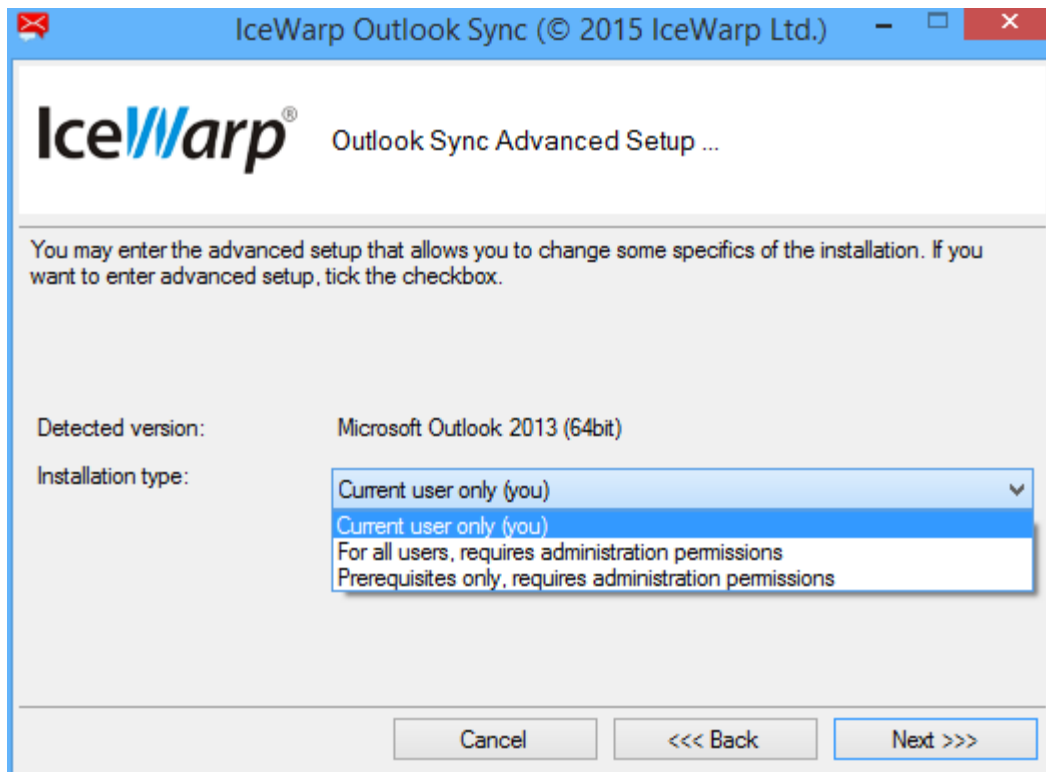


Figure 2 – Installation type selection (Installer page)

Outlook Sync allows you to choose if it is going to be installed for your Windows account only, or for whole computer, meaning that all accounts on that particular machine will be able to use it. It means that if you login with a different account you will see Outlook Sync add-in in Outlook. It has no connection to profile; it is just about installation of program files and registering add-in to Outlook.

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## CURRENT USER INSTALLATION

This type of installation installs Outlook Sync program files to your application data folder and registers Outlook Sync add-in in Outlook for you only. It means that you do not need any administrator’s permissions. You can install it on your own and use the advantages of automatic updates, even if you are not administrator, but use a regular Windows user account.

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## LOCAL MACHINE INSTALLATION

If you want to use Outlook Sync under multiple Windows accounts, you need to install it for whole machine. It needs to have administrator privileges granted because it accesses LOCAL MACHINE registry tree to register add-in for all users and installs Outlook Sync program data to Program Files folder.

## PREREQUISITES ONLY

This option is intended for administrators that want to prepare computer for Outlook Sync installation. It verifies and installs, if required, all prerequisites, except .NET framework 3.5 Service Pack 1 that needs to be installed manually.

*In case you are installing Outlook Sync via MSI account, then because it is intended for mass installations only assuming administrator privileges, it performs local machine installation only.*

## STEP 3 – REQUIRED PACKAGES

- Microsoft .NET framework 3.5 Service Pack 1 (you need this very particular version even if you have installed newer one).

Following packages are installed by Outlook Sync installer automatically, if they are missing, but because all of them require administrator privileges, you need to run installer under Windows administrator account. It is unfortunately not possible to override this requirement, because those packages require modifying files in the areas that are not accessible for a regular user.

- Visual Studio Tools for Office 4.0 (choose 32bit or 64bit depending on your Microsoft Outlook version)
- Primary Interop Assemblies 2007 for Microsoft Outlook 2007
- Primary Interop Assemblies 2010 for Microsoft Outlook 2010 or 2013

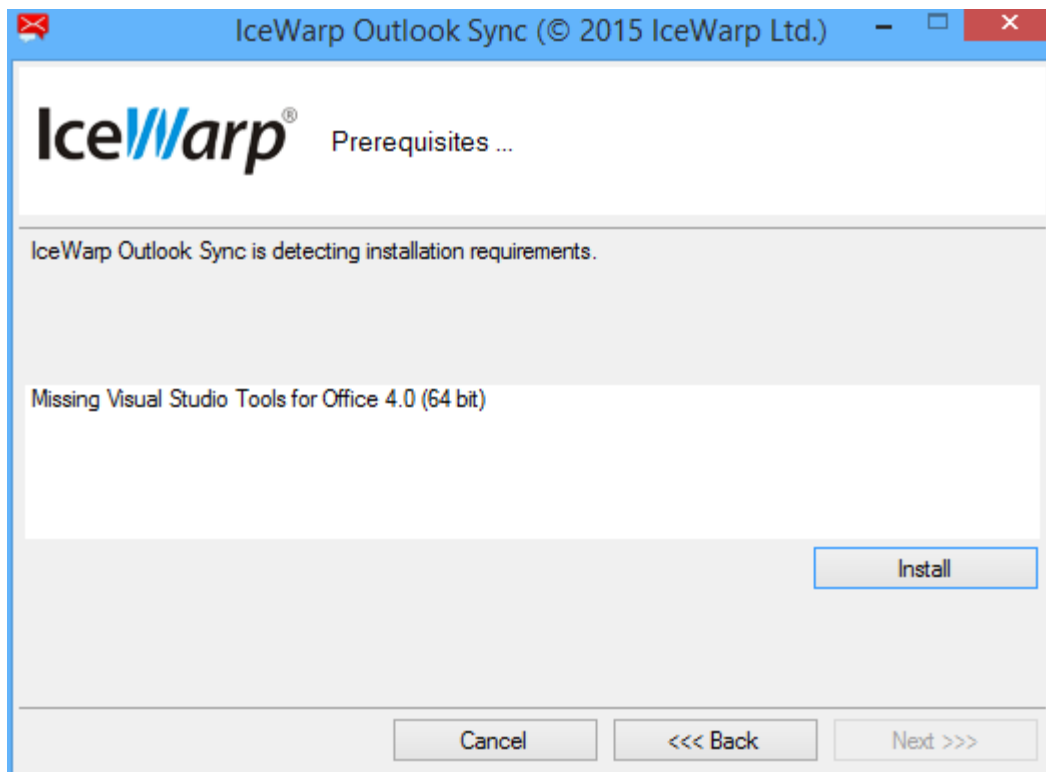


Figure 3 – Prerequisites (Installer page)

If your Windows does not have packages above installed, Outlook Sync installer will offer you their installation but only if it has administrator privileges.

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## STEP 4 – PROFILE

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### WHAT IS PROFILE

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Before you proceed with the installation, it is important for you to decide whether you want a new profile or use your existing profile. Profile is an Outlook construct unifying accounts. If you are using Outlook, you already have a profile with account attached to the server. Account can be of some of supported types, e.g. POP3 or IMAP.

Let's say that Outlook profile is called "Francis", of the user Francis Drake with email [francis.drake@icewarpdemo.com](mailto:francis.drake@icewarpdemo.com). Francis is using IMAP account for reading his mails and SMTP account for sending his mails out. When Francis starts Outlook, he either selects this profile, or has this profile being selected automatically and uses accounts configured in the profile and mentioned above.

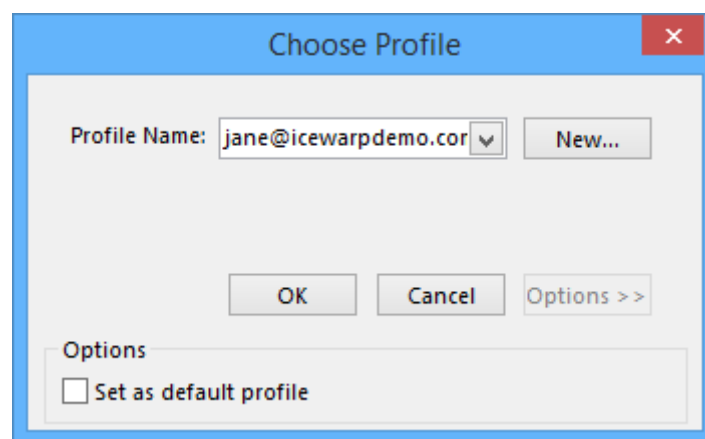


Figure 4 – Outlook's profile selector

You can see a profile selector on the image above. If you do not see that when you are starting Outlook, you have only one profile or your current profile is "Set as default profile". Do not worry; Outlook Sync installer is able to handle both situations.

In such Outlook profile, you may have several accounts of several types. One of these accounts is default, which means Outlook prefers it while sending or during other operations.

POP3 account is the oldest type; it downloads messages from the mail server to your computer. And optionally leaves a copy on the mail server, but they are usually deleted after a specified number of days.

IMAP account does not download and delete messages, but instead it works online as a mirror of what is on the mail server and what is on the client.

Both previous account types are able to work with mail items only, Outlook Sync tries to combine the best approach from both and in addition, it is able to work with all items, not only with mails. In reality, Outlook Sync is using IMAP-like approach to access mails and other items.

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### WHAT IS OUTLOOK SYNC PROFILE

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IceWarp Outlook Sync profile is an attachment to the existing, or newly created, Outlook profile. This attachment is possible only to a profile with POP3 account that is also set as default. If you create a new profile, Outlook Sync creates such account on its own and you do not need to do any other action. Outlook Sync is using a protocol very similar to IMAP, but internally it is using POP3 account in Outlook, because only this account has Personal Folders.

Because Outlook Sync is able to synchronize mail items, and also calendar, contacts, journal, and other non-mail items, also called groupware items, you may choose between two profiles – regular and so called “Groupware only” profile.

*On the Outlook side, groupware items are stored in Outlook Data File called Personal Folders file (.pst). If you were using Microsoft Exchange before, you might be familiar with offline Outlook Data File (.ost), but this format is not compatible with .pst.*

Regular profile is what you want in most cases; it synchronizes everything from Microsoft Outlook to IceWarp server and vice versa.

But, if you want to use POP3 account to access your mails, and also be able to synchronize groupware items, a “Groupware only” profile is what you want. In this profile, all mails are left untouched and Outlook Sync is synchronizing only groupware items.

*If in doubt what profile you need, please contact your administrator for an advice.*

## I WANT A NEW PROFILE

If you are using IMAP account, or if you are not sure about it, you need to create a new profile. It is, after all, a recommended approach in most cases.

All you need to do is to run EXE installer and choose whether you want a regular profile or “Groupware only” profile.

## I ALREADY HAVE OUTLOOK PROFILE AND I WANT TO USE IT

If you already have a profile and you still want to use it because you have data in it, nothing is lost, and you can attach Outlook Sync to your existing profile. In this case, select that you do not want to create profile in Outlook Sync installer.

If your profile already contains POP3 account that is default (if not, make it so), you can run Outlook and in the IceWarp Outlook Sync ribbon (or in Tools menu) select “Bind profile”. Binding is a process of attaching Outlook Sync profile to Outlook profile.

If you do not have POP3 account in your profile, you can create a new one.

In this scenario, you need to make sure that you do not have multiple accounts targeting the same account. For example if Francis Drake, previously described, in his profile “Francis Drake” already has IMAP account for [francis.drake@icewarpdemo.com](mailto:francis.drake@icewarpdemo.com), you cannot attach Outlook Sync profile. It would not work flawlessly.

## SCENARIOS

### SCENARIO 1

User “John Doe” has a profile “John” with POP3 account for [john.doe@icewarpdemo.com](mailto:john.doe@icewarpdemo.com). He may also have other accounts, for example IMAP account to his private email [johnny@privateicewarpdemo.com](mailto:johnny@privateicewarpdemo.com).

John needs to make sure that his POP3 account is default, and then he can perform “binding”. Outlook restarts and John’s POP3 account [john.doe@icewarpdemo.com](mailto:john.doe@icewarpdemo.com) is now operated by Outlook Sync together with its Personal Folders.

Outlook Sync detects that Personal Folders already contains items and asks John whether he wants to delete them, or upload them to the IceWarp server.

## SCENARIO 2

User “Jane Smith” has a profile “Jane” with IMAP account for [jane.smith@icewarpdemo.com](mailto:jane.smith@icewarpdemo.com) and no other accounts. In this case it is better to create a new profile.

## SCENARIO 3

User “John Roe” has a profile “Johnny” with IMAP account for [john.roe@icewarpdemo.com](mailto:john.roe@icewarpdemo.com) and multiple accounts for other emails, private or office. John needs to create POP3 account, make it default. Delete IMAP account for [john.roe@icewarpdemo.com](mailto:john.roe@icewarpdemo.com) and perform “binding”. Outlook restarts and John’s profile is now being handled by Outlook Sync. John must ensure that POP3 account he just created leaves a copy of a message on the server. Alternatively newly added POP3 account does not need to have valid credentials to avoid connection to the server.

This is the most difficult scenario and in doubts, do not hesitate to contact your administrator for assistance.

## SCENARIO 4

User “Melanie Doe” has a profile “Melanie” and does not want to use IMAP-like access that is used by Outlook Sync. Instead, she wants to use POP3 account to access her mails, but she wants to be able to synchronize groupware items. In this case, Melanie creates a “Groupware only” profile. This profile contains newly created POP3 account that targets her IceWarp server and downloads messages.

## HOW TO USE MY ALREADY EXISTING PROFILE

This option is only accessible when IceWarp Outlook Sync is installed and the profile currently selected in MS Outlook is not bond to it. You need to have one POP3 account that is set as default, if your profile does not contain such account or you want to add new one, follow chapter “Adding a POP3 account to Outlook profile”.

*Only profiles with POP3 account that is set as default can be bound to the Outlook Sync.*

## STEP 1 – SELECT PROFILE

Launch MS Outlook. In the **Choose Profile** dialog, select the appropriate profile that you want to bind with IceWarp Outlook Sync.

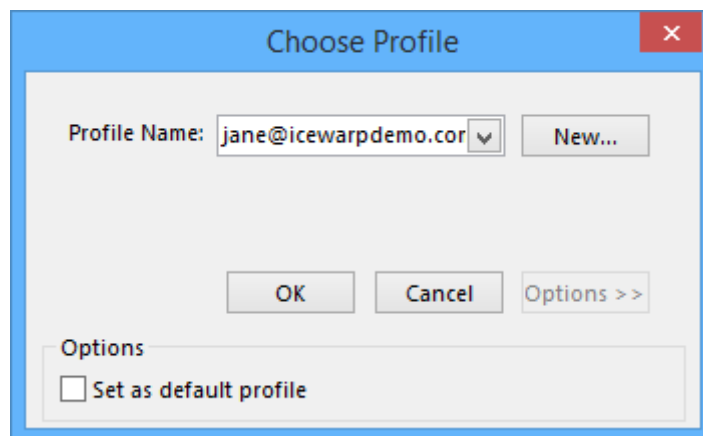


Figure 5 – Outlook profile selector

Click the **OK** button.

## STEP 2 – BIND THE PROFILE

On the Add-Ins tab, click the **Bind this profile with server account** button. The **Settings** dialog opens. Fill in all needed fields – see the **Settings** chapter.

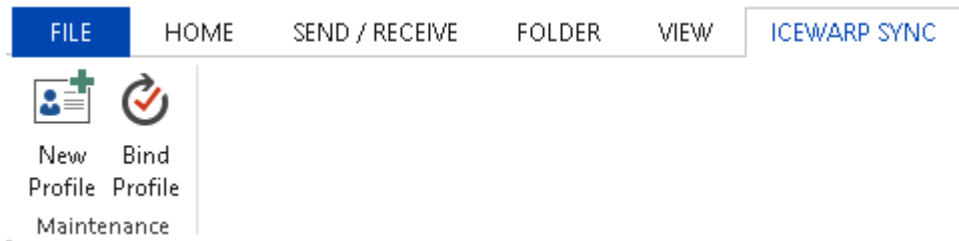


Figure 6 – Outlook Sync maintenance tab

## STEP 3 – FIRST LAUNCH WITH OUTLOOK SYNC PROFILE

During the first MS Outlook launch after IceWarp Outlook Sync installation, you may be presented with the **Initial Synchronization** dialog.

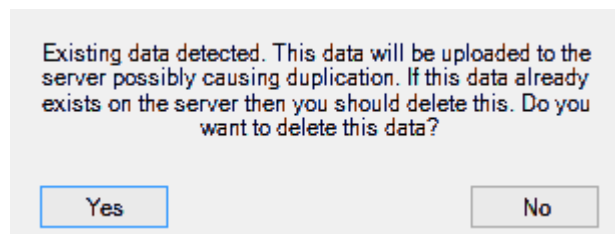


Figure 7 – Existing data treatment dialog

If your local Outlook **.pst** file includes any data (emails, contacts, etc.) – it probably does – and you want to keep them, click **No**. After this action, Outlook Sync appends all data found in attached **.pst** file back to the server.

If you want to delete all previous data, click **Yes**.

*Please note that this operation is irreversible. If in doubt consult your administrator.*

## STEP 5 – AUTOMATIC CONFIGURATION (SMARTDISCOVER)

Outlook Sync has been designed to work out of the box, all you need is your email address and password. You can also decide whether you want a profile or if the new profile should be “groupware only”. After you fill in your credentials, Outlook Sync’s installer then contacts your IceWarp server and loads configuration set by your administrator.

This configuration consists of services ports and security settings, and most importantly your license. If this fails, usually because SmartDiscover service is not properly configured on the server, installer fallbacks to the manual configuration where you need to fill in all required properties.

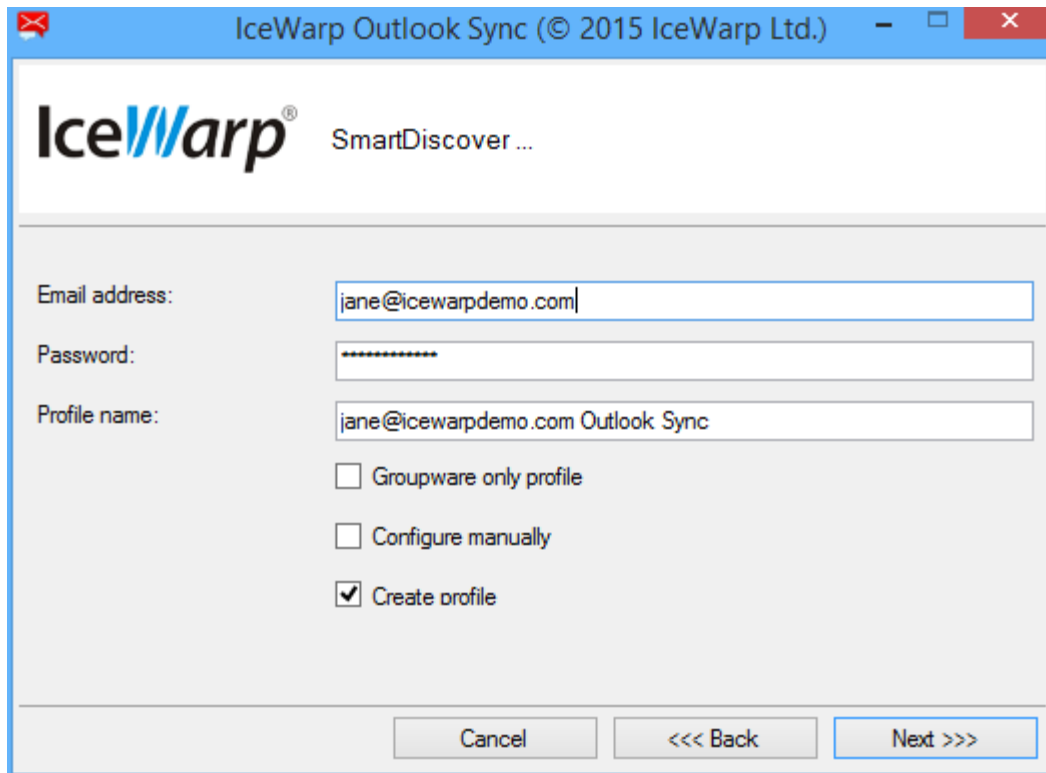
The screenshot shows a Windows-style window titled "IceWarp Outlook Sync (© 2015 IceWarp Ltd.)". Inside the window, the IceWarp logo is on the left and "SmartDiscover ..." is on the right. Below this, there are three text input fields: "Email address:" containing "jane@icewarpdemo.com", "Password:" with masked characters, and "Profile name:" containing "jane@icewarpdemo.com Outlook Sync". Under these fields are three checkboxes: "Groupware only profile" (unchecked), "Configure manually" (unchecked), and "Create profile" (checked). At the bottom of the window are three buttons: "Cancel", "<<< Back", and "Next >>>".

Figure 8 – SmartDiscover (Installer page)

The SmartDiscover page displays all previously described options.

- Email address and password are login credentials you were supplied with by your administrator, if you do not know them, do not hesitate to contact your administrator.
- Profile name – it is the name of Outlook profile that will be handled by Outlook Sync
- Groupware only profile – determines if the profile will be regular or “Groupware only”
- Configure manually – skips SmartDiscover and installer will not contact server for configuration details. It means that you are on your own there.
- Create profile – if unchecked, installer just installs Outlook Sync program files, but will not create profile.

*If you do not know all configuration properties and Smart Discover had failed, contact your administrator.*

---

## STEP 6 – LICENSE

If you do not have license or if you do not want to activate license yet, your Outlook Sync will be running in 30 days fully functional trial mode. In this mode you have no limits and you can try all features of Outlook Sync.

If you have used Smart Discover and if it was able to retrieve also license information, installer offers you a possibility of license activation.

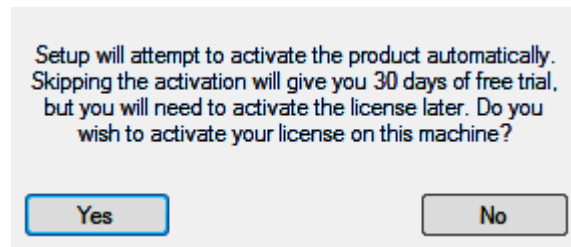


Figure 9 – License activation dialog

If you click on “Yes”, license will be activated on your machine, if you click “No”, then Outlook Sync will run in 30 days trial mode. You may activate your license later, or add a new license number later in Outlook Sync settings. See IceWarp License chapter for details.

## MANUAL CONFIGURATION

If you were not able to use Smart Discover, or if you want to have installation configuration under your full control, you may select “manual configuration”. In that case, SmartDiscover is completely skipped and you are free to configure all required services.

Basically you need to configure profile properties, incoming server and outgoing server properties, and if you chose “Groupware only” profile then additionally POP3 configuration.

## STEP 7 – PROFILE PROPERTIES

In the profile properties you need to fill in profile name, your email address and also a display name for Outlook.

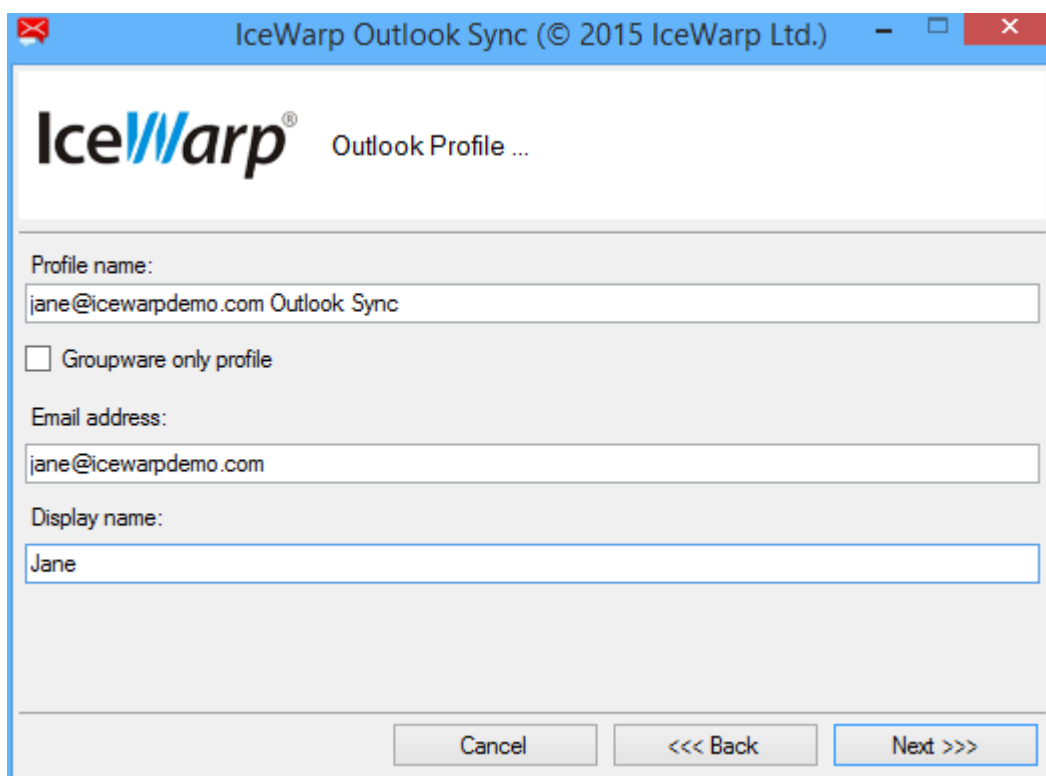
A screenshot of the "IceWarp Outlook Sync (© 2015 IceWarp Ltd.)" window. The title bar is blue with a red close button. The main area has a white background with the IceWarp logo and the text "Outlook Profile ...". Below this, there are three text input fields: "Profile name:" with the value "jane@icewarpdemo.com Outlook Sync", "Email address:" with the value "jane@icewarpdemo.com", and "Display name:" with the value "Jane". There is a checkbox labeled "Groupware only profile" which is currently unchecked. At the bottom, there are three buttons: "Cancel", "<<< Back", and "Next >>>".

Figure 10 – Profile properties (Installer page)

- Profile name is the name of Outlook profile, previous value from SmartDiscover tab is preserved.



- Email address is your email address that will be associated to your new profile.
- Display name is your name and surname that is used for configuring Outlook mail properties.

## STEP 8 – INCOMING SERVER CONFIGURATION

Incoming server is a mail server where your messages are stored; its location should be supplied to you by your administrator.

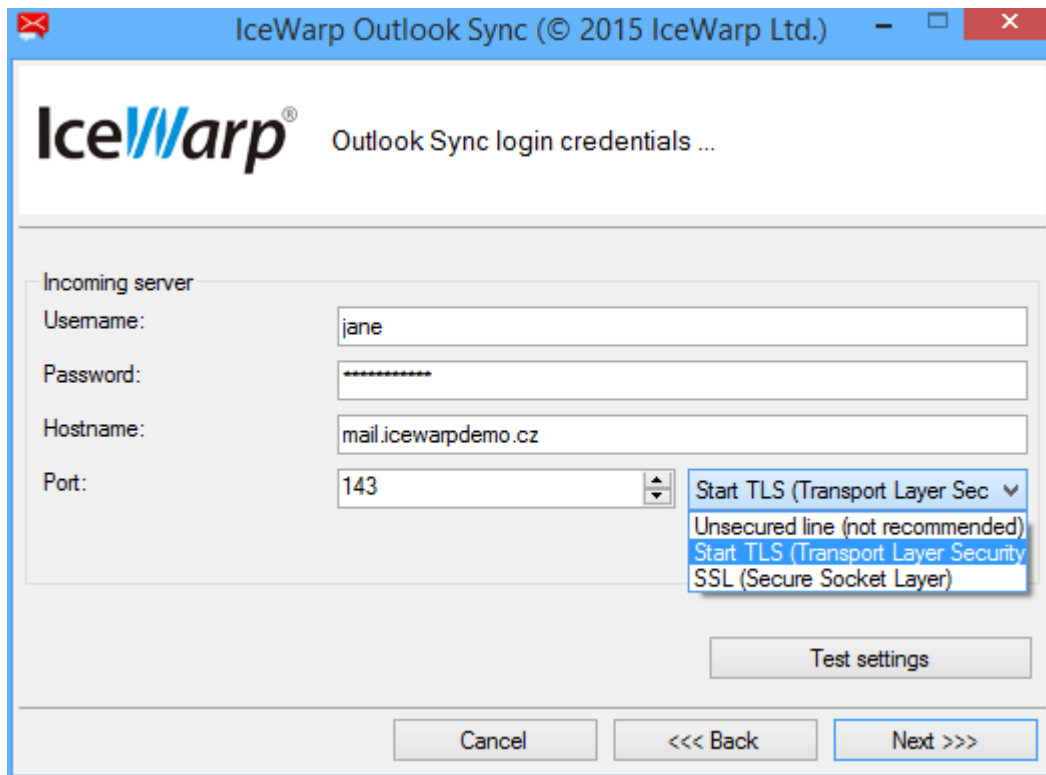


Figure 11 – Incoming server properties (Installer page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) 's username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Password is your secret key to access your account.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 143.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

Start TLS and SSL are recommended options. Both ensure that all your communication is safely encrypted. Start TLS is able to connect to a regular IMAP port 143 and then performs STARTTLS command to initiate secure connection. On the other hand, SSL requires secured port from the very first moment, by default it is 993.

If you click on “Test settings” button, installer tries to contact IceWarp server and login using the specified credentials and connection details.

## SCENARIO 1

User Jane is travelling a lot and on some hotel's WiFis the only available ports are standard ones, and port 993 is blocked. But Jane wants her Outlook Sync to be secured; in this case, Jane selects "Start TLS" and uses port 143.

## SCENARIO 2

User John is using Outlook Sync on stationary computer and has no problems with ports and firewalls, in this case, he may use "Start TLS" or "SSL" on his wish.

## STEP 9 – OUTGOING SERVER CONFIGURATION

Outgoing server is a mail server for sending your messages, in most cases; the configuration is exactly the same as your incoming server, except the port.

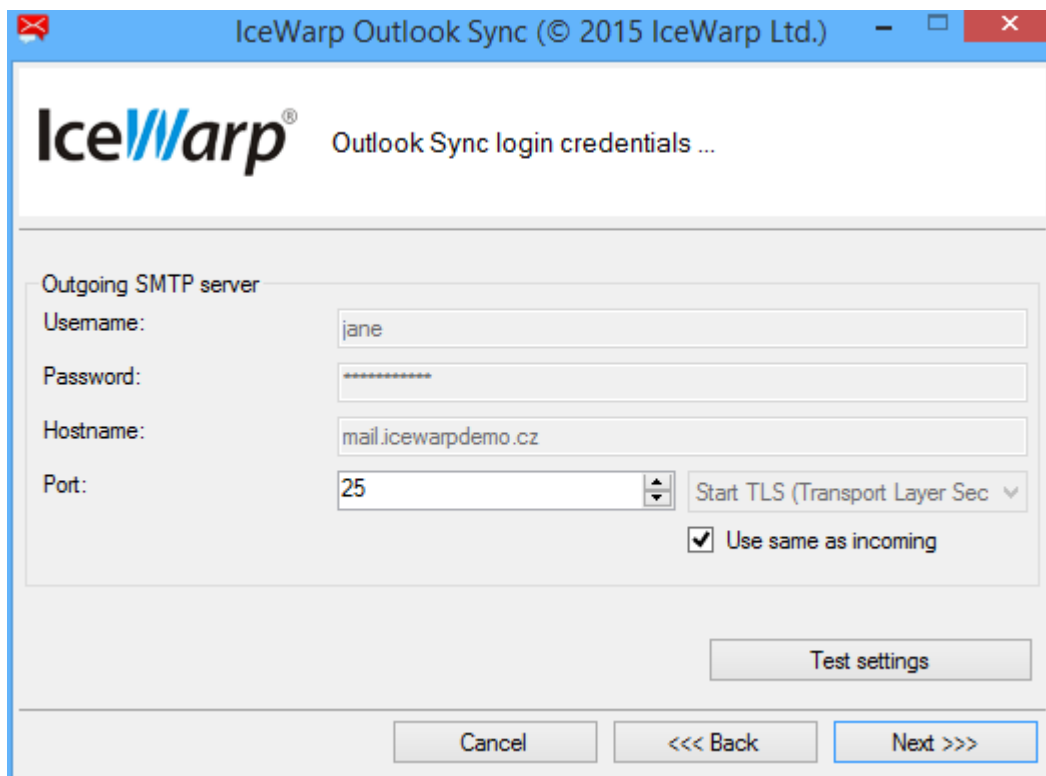


Figure 12 – Outgoing server properties (Installer page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) ‘s username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Password is your secret key to access your account.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 25.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

In case of outgoing server, everything as from the incoming server applies too; including the line security. It is recommended to “Use same as incoming”, in which case all previous configuration is used and line security and port is configured as default.

You may also test if your values are correct by clicking on “Test connection” button.

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## STEP 10 – INCOMING POP3 SERVER CONFIGURATION FOR GROUPWARE ONLY PROFILE

If you selected a “Groupware only” profile, you will be asked for POP3 server details.

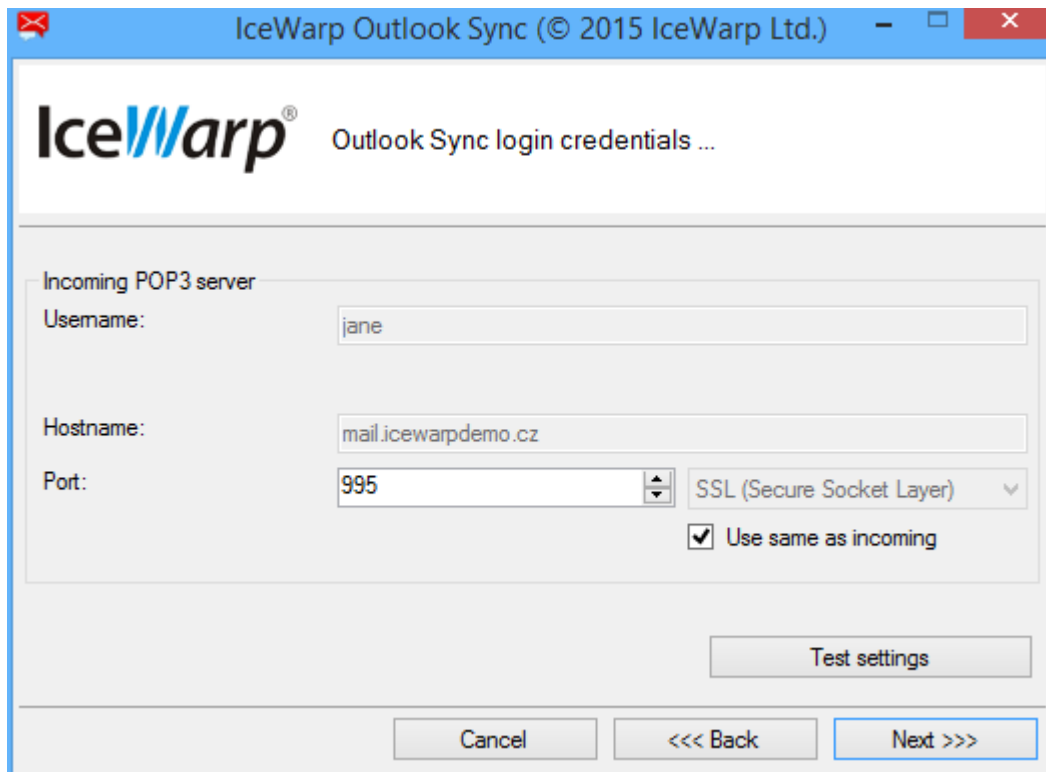


Figure 13 – Incoming POP3 server properties (Installer page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) 's username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 110 for plain, or 995 for secured line.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

POP3 account on Outlook does not allow you to select STARTTLS, there are only two options available for line security; SSL (Secure Socket Layer) or Plain.

---

## STEP 11 – FINISHING THE INSTALLATION PROCESS

After you pass through all previous pages, all what is left is a progress window after which the last page with the summary appears. If you selected “Create profile”, no matter what type, Outlook Sync installer attempts to start Outlook with the configuration file.

## OUTLOOK SYNC CONTROLS

If you have successfully installed Outlook Sync, with or without profile then when you run Microsoft Outlook, you can see IceWarp Sync ribbon.

### OUTLOOK SYNC WITHOUT PROFILE

If you are running Microsoft Outlook without Outlook Sync profile, you have two options what to do, “bind profile” or create brand “new profile”.

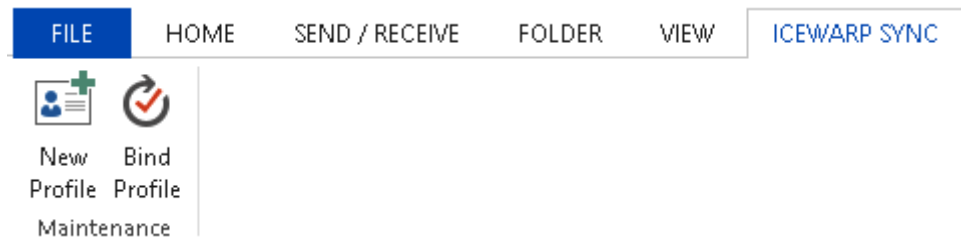


Figure 14 – IceWarp Sync tab without Outlook Sync profile

### OUTLOOK SYNC WITH PROFILE

Fully functional Outlook Sync with its profile welcomes you with multiple options, not only in IceWarp Sync ribbon, but offers you control over entire application.

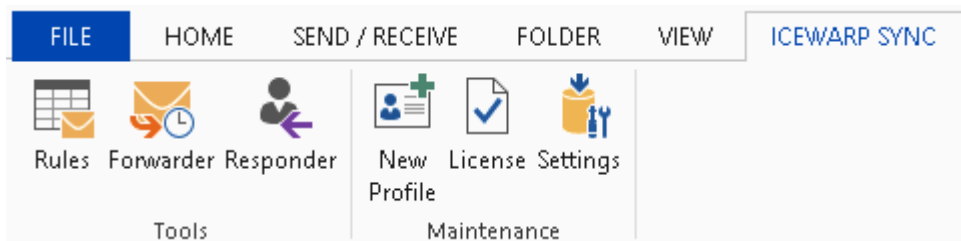


Figure 15 – IceWarp Sync tab with Outlook Sync profile

## TOOLS

Tools are available only if Outlook Sync is fully functional and allows you to control several options of your user account. Changes made in the tools will be reflected also in WebClient.

### RULES

Click the button to open the **IceWarp Options** dialog – **Rules** tab. Here you can create and edit rules that can help you to catch spam and viruses as well as to sort messages and direct them to wished folders.

Rule is, basically, a command that says *“where some condition is met, then perform an action”*. As an example, you may want to sort messages from a particular sender, e.g. “newsletter@myfavouritemagazine.com” and put all messages coming from this email to a folder called “magazines”. Then the rule you can construct would be: *“where **From: message header matches** [newsletter@myfavouritemagazine.com](#) then **Move to magazines**”*. You can see that condition is **From: message header matches** [newsletter@myfavouritemagazine.com](#) and action is **Move to magazines**.

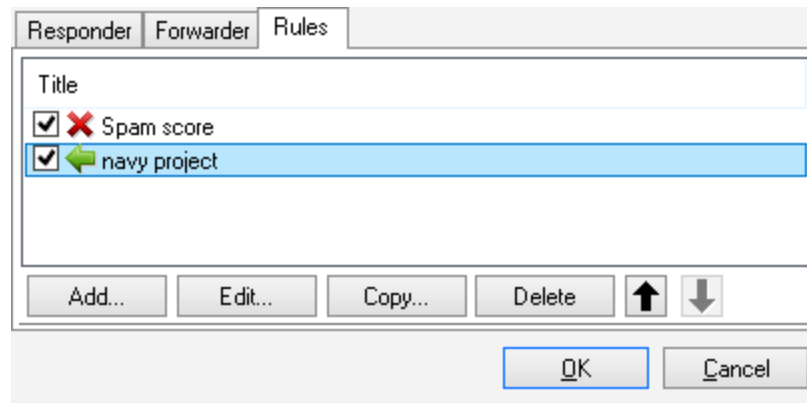


Figure 16 – Rules main dialog

Field	Description
Check boxes	Tick the box(es) next to the rule(s) that you want to have active.
Add	Click the button to add a new rule. The <b>Rule</b> dialog opens.
Edit	Click the button to modify an existing rule. The <b>Rule</b> dialog opens.
Copy	Select a rule and click this button to copy the rule. This is handy when you want to create a similar rule.
Delete	Click the button to delete the selected rule. Multiple rules can be selected for deletion by holding the <b>Ctrl</b> key and clicking multiple rules. A range of rules can be selected by clicking the first rule of the range and then clicking the last one while holding down the <b>Shift</b> key.
Up/down arrows	Click the appropriate arrow to move the selected rule up or down. Order of rules in the list affects the order how they are performed.

## RULE DIALOG

Rule dialog offers you ability to add/edit a rule. Based on the example above you can create your own rules, with condition(s) and action(s) of your needs.

The screenshot shows the 'Rule dialog' window. It is divided into several sections:

- Conditions:** A list of conditions with checkboxes. The first condition, 'Where From: message header matches some words', is checked and highlighted in blue.
- Actions:** A list of actions with checkboxes. The 'Move to folder' action is checked and highlighted in blue.
- Description:** A text area showing the rule's description: 'Where From: message header matches navy' and 'Move to Navy Project'.
- Title:** A text box containing the title 'navy project'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Figure 17 – Rule dialog

Field	Description
Conditions	<p>In this area, you can select the properties of the message that you wish to perform some test on.</p> <ul style="list-style-type: none"> <li>Multiple conditions can be tested by ticking multiple boxes.</li> <li>The same condition can be added multiple times by double clicking the condition when it is checked.</li> </ul>
Actions	<p>In this area, you select the action(s) that you want to perform on the message if the rule evaluates as true.</p> <ul style="list-style-type: none"> <li>Multiple actions can be selected by ticking multiple boxes.</li> </ul>

Logic buttons	<p>The buttons below the Actions block are used to add logic to the rule</p> <ul style="list-style-type: none"> <li>▪ The exclamation mark will negate (NOT) the condition you are currently modifying.</li> <li>▪ The up and down arrows will move the conditions up and down within the rule.</li> <li>▪ The X button will delete the current condition.</li> </ul> <p>We recommend experimentation with these buttons to familiarize yourself with their function.</p>
Description	<p>This will show the rule you are building or modifying and will change dynamically as you select or de-select conditions and actions.</p> <p><i><b>NOTE: Areas of the rules that can be modified are highlighted in this block and clicking them opens a further dialog box to allow you to define your test.</b></i></p>
Title	The name of the rule – for identification purposes.

## CONDITIONS

For the detailed list of conditions see “Appendix A – Conditions”.

## ACTIONS

For the detailed list of actions see “Appendix B – Actions”.

## FORWARDER

Forwarder allows you to redirect your mail correspondence to some other mail address, it can be your second email address, or your co-worker’s email address in case you leave your office for a vacancy. If you check “Leave a copy”, incoming mail remain also in your inbox, otherwise it will be deleted and the only existing copy will be in the forwarded inbox.

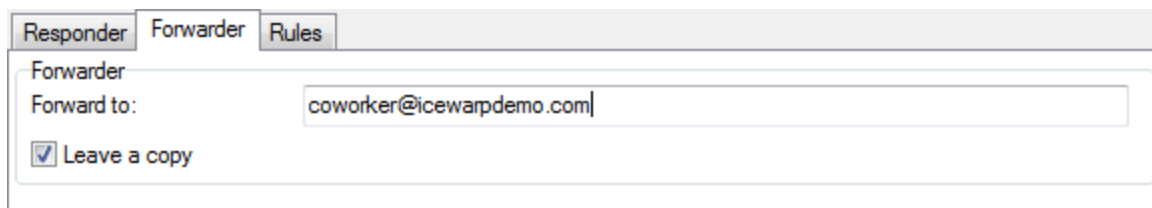


Figure 18 – Forwarder dialog

## RESPONDER

Click this button to open the **IceWarp Options** dialog – **Responder** tab. Here you can set how email messages will be replied during your absence. If you setup responder, whoever sends you a message will receive a defined response.

The dialog box has three tabs: **Responder**, **Forwarder**, and **Rules**. The **Responder** tab is active.

**Responder**

Mode: Respond once

Respond again after (Days): 0

Respond only if between: 2013/10/25 ... 2013/12/05

No Responder For:

alison@icewarpdemo.cz

**Responder Message**

From: dias@icewarp.com

Subject: Re: %%Subject%%

Message text:

Dear %%From\_Name%%,  
 I cannot respond your email message because of my well-earned vacation.  
 I'll be back at my desk from November 6th. I'll be glad to help you.

Best regards,  
 Francis

Buttons: OK, Cancel

Figure 19 – Responder dialog

Field	Description
Mode	<p>Select one of modes:</p> <ul style="list-style-type: none"> <li>▪ <b>Disabled</b> – use this mode when you are at your desk – hard-working – or you do not want emails to be responded.</li> <li>▪ <b>Respond always</b> – select this mode if you want every email message to be responded.</li> <li>▪ <b>Respond once</b> – select this mode if you want every sender (email address) to be responded only once.</li> <li>▪ <b>Respond again after a period</b> – select this mode if you want a response to the same sender to be sent after a period specified in the <b>Respond again after (Days)</b> field.</li> </ul>
Respond again after (Days)	<p>Select the <b>Respond again after a period</b> mode and fill in the appropriate period to this field. The message defined here will be sent to the same sender after this period. (Provided that this sender will send a new email.)</p>



Respond only if between	Use the "..." buttons to specify a period when the message will be sent.
No Responder For	Enter email addresses of users that are to be excluded from these responses.
From	Fill in your email address.
Subject	Specify a response subject. It is possible to use the <b>%%Subject%%</b> variable. This will copy the original subject. See the figure above.
Message text	Word your response here. It is possible to use server variables within the message text. E. g. the <b>%%From_Name%%</b> one will copy the sender's name (see the figure above).

## MAINTENANCE

Following ribbon differs depending on the profile, as briefly explained above. But buttons with the same name have the same functionality in both cases.

## NEW PROFILE

If you want to create a new profile, you can start profile manager directly from Outlook, this will cause Outlook's exit. For profile manager details see chapter "Profile manager".

## BIND PROFILE

Binding profile allows you to attach Outlook Sync to the current Outlook profile. For details, see chapter "I already have Outlook profile and I want to use it".

## LICENSE

After a successful installation, IceWarp Outlook Sync works in 30 day evaluation mode and will stop working if not activated before the evaluation period expires. To activate your license, have your activation key ready and proceed to the **IceWarp License** chapter for more information.

To check your license validity, select the **Add-Ins** tab – **Settings** button – **License** tab. See the **Settings** chapter – **License** section.

## SETTINGS

This button brings you to the main Outlook Sync settings dialog.

## OUTLOOK SYNC SETTINGS BRIEF DESCRIPTION

Outlook Sync settings dialog allows you to configure all aspects and define behavior of application. Some of settings can be configured on the server and, depending on the administrator's decision, can be forced or left as default. For details about this behavior, see chapter "Provisioning system".

## LOGIN CREDENTIALS

The screenshot shows a dialog box titled "Login credentials" with several tabs: "Login credentials", "Advanced", "Synchronization", "Appearance", "License and updates", "Logs", and "About". The "Login credentials" tab is active. It contains two main sections: "Login" and "Incoming Server Credentials".

**Login section:**

- Username:** A text field containing "bart.dias".
- Password:** A text field filled with dots, indicating a masked password.
- Email address:** A text field containing "bart.dias@icewarpdemo.cz".
- ☒ Remember password
- ☐ Do not show login errors
- Change password** button

**Incoming Server Credentials section:**

- Hostname:** A text field containing "mail.icewarpdemo.com".
- Port:** A text field containing "993" with a spin button on the right.
- SSL (Secure Socket Layer):** A dropdown menu currently showing "SSL (Secure Socket Layer)".
- Manage certificates** button
- ☐ Do not show connection errors

At the bottom right of the dialog are **Cancel** and **Ok** buttons.

Figure 20 – Login credentials (Settings page)

Field	Description
Username	Enter your username for your mail server. It is filled in during installation.
Password	Enter your password for your mail server. It is filled in during installation. If changed after installation, change it also here.
Email address	Enter your email address. It is filled in during installation.

Remember password	Tick the box if you do not want to be asked for your password always when you launch IceWarp Outlook Sync.
Do not show login errors	Tick the box if you do not want to have shown messages in the case, IceWarp Outlook Sync cannot login to the server.
Change password	Click the button to open a usual dialog for a password change.
Hostname	Enter the hostname of your mail server.
Port	The default port number for IMAP service is 143.
Connection type selection	<p>Select the appropriate connection type:</p> <ul style="list-style-type: none"><li>• <i>Unsecured line (not recommended)</i> – the connection is not encrypted at all.</li><li>• <i>Start TLS (Transport Layer Security)</i> – first attempt to establish connection is done by usual (non-encrypted) communication. After connection establishing, encrypted communication is used.</li><li>• <i>SSL (Secure Socket Layer)</i> – the connection is fully encrypted. By default, the SSL port of 993 is used.</li></ul>
Manage certificates	Click the button to open the <b>Manage certificates</b> dialog – see lower. Select an unwished (approved) certificate and click the <i>Remove</i> button to delete this certificate.
Do not show connection errors	Tick the box if you do not want to have shown messages in the case, IceWarp Outlook Sync cannot connect the server.

## ADVANCED

Login credentials | **Advanced** | Synchronization | Appearance | License and updates | Logs | About

**Connection**  
 Authentication type: CRAM MD5

**Synchronization**  
 Conflict resolution: Server wins  
 Folder synchronization threshold (messages in folder): 1024  
 Threshold for full download (MB): 0.70 Custom  
☐ Download files fully  
 Pause between processing (ms): 20  
☐ Skip trash folder startup check

**POP3 Server**  
 Server port: 5110  
 Start Stop

**Outlook Settings**  
☒ Disable TNEF (requires Outlook restart)

Cancel Ok

Figure 21 – Advanced (Settings page)

Field	Description
Authentication type	Select authentication type you want to use: <ul style="list-style-type: none"> <li><b>Cram MD5</b> – server sends a string, credentials to be encrypted with by a client. Encrypted credentials are sent to the server. It encrypts saved credentials with the same string and compares results.</li> <li><b>Plain</b> – no encryption (or base64) is used.</li> </ul>
Conflict resolution	It is possible to access a server using two (or even more) clients in the same time. When some item (contact, event, etc.) is changed from one client, and changed to a different value from the other one, the solution can be: <ul style="list-style-type: none"> <li><b>Server wins</b> – the data on the server are used in the case of conflict.</li> <li><b>Client wins</b> – the last data change wins in the case of conflict.</li> </ul>

Full synchronization threshold	<p>Up to this number of emails, these items are parsed and synchronized. When number of emails exceeds this number, synchronization is based on Outlook information about items that need to be synchronized (i. e. have been changed). If there are many messages, Outlook Sync does not loop over all messages but deals with a change report provided by Outlook. Because Outlook sometimes does not inform about the changes, 100% functionality is guaranteed only if we loop over all emails.</p> <p>It is not recommended to set this value to much higher than <b>1024</b> because the processing is then very CPU consuming.</p>
Threshold for full download (MB)	<p>Up to this email size (in megabytes), whole emails are downloaded. When email size exceeds this number, only email headers are downloaded. Whole emails are downloaded in the moment they are clicked (to open them). This field is enabled only when the <b>Custom</b> option (see lower) is selected.</p>
Custom	<p>Select one of the following:</p> <ul style="list-style-type: none"> <li>▪ <b>Custom</b> – this option lets you to specify the <b>Threshold for full download</b> feature.</li> <li>▪ <b>Headers</b> – only email headers will be fully downloaded.</li> <li>▪ <b>Full</b> – all emails will be fully downloaded.</li> </ul>
Download files fully	<p>This feature is related to file type folders only.</p> <p>If the box is ticked, files are downloaded fully regardless of the download threshold set above.</p>
Pause between processing (ms)	<p>Specify a pause between processing of single items. Very advanced feature – do not set to 0 (zero).</p>
Server port	<p>Specify the port POP3 server to listen on. For more information about POP3 server, refer to the <b>Advanced IceWarp Outlook Sync Background</b> chapter.</p>
Start/Stop	<p>Click the buttons to start/stop this POP3 server. Do not do stop the server unless you exactly know what you want to do.</p> <p>For more information about POP3 server, refer to the <b>Advanced IceWarp Outlook Sync Background</b> chapter.</p>
Disable TNEF (requires Outlook restart)	<p>In the case you forward emails with HTML formatting and recipients complain they receive the <b>winmail.dat</b> file (it includes HTML formatting) or weirdly looking messages, tick this box to disable creating of this file – this solves the problem.</p> <p><b>NOTE: It is necessary to restart Outlook to apply.</b></p>

## SYNCHRONIZATION

Login credentials | Advanced | **Synchronization** | Appearance | License and updates | Logs | About

**Folders for automatic synchronization**

- ☒ Calendar
- ☒ Contacts
- ☒ Documents
- ☐ Drafts [Not synchronized]
- ☐ INBOX [Always priority]
- ☒ Journal
- ☒ Notes
- ☐ Outbox [Controlled by Outlook]
- ☐ RSS Feeds

**Synchronization frequency**

Synchronize folder structure after N minutes:

☐ Use Outlook Settings

Synchronize selected priority folders (red) after N minutes:

Synchronize selected standard folders after N minutes:

**Synchronization exceptions**

- ☒ Synchronize content of the selected folders immediately after local change is detected
- ☒ Synchronize Global Address Books automatically
- ☐ Do not show progress
- ☒ Automatically revert changes in read only folders

Cancel Ok

Figure 22 – Synchronization (Settings page)

Field	Description
Folders for automatic synchronization	Tick folders that you want to have synchronized automatically. Other folders are synchronized when entered or when you select a manual synchronization (the <b>Synchronize</b> button).
Synchronize folder structure after N minutes	Select time in minutes. Folder structure (added or deleted folders) will be synchronized in this interval.  <i>NOTE: This field can be disabled because of provisions set on your server. If in doubt, ask your administrator.</i>

Use Outlook Settings	<p>Tick this box if you want to use synchronization settings as set for the original Outlook POP3 account.</p> <p><i>NOTE: This check-box can be disabled because of provisions set on your server. If in doubt, ask your administrator.</i></p>
Synchronize selected priority folders after N minutes	<p>Select time in minutes. Priority folders will be synchronized in this interval. By default, it is one minute.</p> <p><i>NOTE: To set a folder as a priority one, right-click it in the <b>Folders for automatic synchronization</b> list and select the <b>Priority sync</b> item. Priority folders are marked red.</i></p> <p><i>NOTE: This field can be disabled because of provisions set on your server. If in doubt, ask your administrator.</i></p>
Synchronize selected standard folders after N minutes	<p>Select time in minutes. Standard folders will be synchronized in this interval. By default, it is 30 minutes.</p>
Synchronize content of the selected folders immediately after local change is detected	<p>Tick the box if you want to have selected folders synchronized immediately after performing (and saving) any change – e. g. after creating a new contact, event, etc.</p>
Synchronize Global Address Books automatically	<p>Tick the box if you want to have synchronized Global Address Books within standard folders interval. (Minimal interval is 60 minutes.)</p>
Do not show progress	<p>Tick the box if you do not want to have synchronization progress displayed.</p>
Automatically revert changes in read only folders	<p>Tick the box if you do not want to have maintained content of your read-only folders at the state as they exist on the server without having to deal with Outlook alerts.</p>

## APPEARANCE

The screenshot shows the 'Appearance' settings window for Outlook Sync. It features a tabbed interface with the following sections:

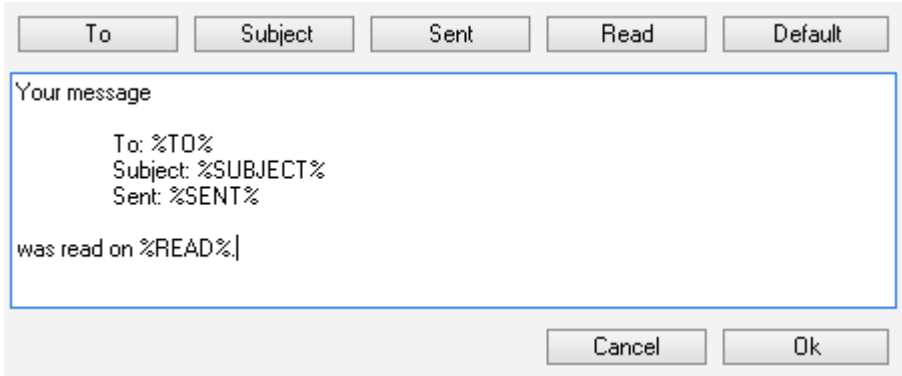
- Localization:** A dropdown menu for 'Language' is set to 'English'.
- New mail options:**
  - ☒ Show desktop notification
  - Hide notification after (Seconds): A numeric input field set to '5'.
  - ☒ Play sound when new message arrives
  - Select sound file: A text input field with a browse button ('...').
  - ☒ Default sound
  - Test sound: A button.
- Read receipts:**
  - ☒ Handle read receipts
  - Handling: A dropdown menu set to 'Ask me before sending a response'.
  - Content of the read receipt: An 'Edit' button.
- Address Books:** A dropdown menu for 'Display Address Book names as:' is open, showing options: 'Full folder path', 'Numbered structure' (highlighted), 'Folder name only', 'Full folder path', and 'Manual handling (turned off)'.

At the bottom right are 'Cancel' and 'Ok' buttons.

Figure 23 – Appearance (Settings page)

Field	Description
Language	Select a wished language from the list.
Show desktop notification	Tick the box if you want to have shown notifications of incoming messages.



Delay before close (seconds)	Set how long time is this notification to be shown.
Play sound when new message arrives	Tick the box if you want to be notified by playing sound.
Select sound file	You may want to have another sound played. Use the "..." button to browse for the appropriate file. It should be of the <b>.wav</b> format. The adequate sound length is 1 – 1.5 second.
Default sound	Tick the box in the case you want to have the default sound played.
Test sound	Click the button if you want to test the sound you have selected.
Read receipts	Tick the box if you want to have handling of the read receipts active.
Handle read receipts	<p>Select a mode from the list:</p> <ul style="list-style-type: none"> <li>▪ <i>Ask me before sending a response</i> – after reading an email message, you will be asked whether a read confirmation should be sent (in the case a message sender has requested it).</li> <li>▪ <i>Always send a response</i> – a read confirmation will be sent automatically (in the case a message sender has requested it).</li> <li>▪ <i>Never send a response</i> – a read confirmation will not be sent at all.</li> </ul>
Content of the read receipt	<p>Click the <b>Edit</b> button to change read receipt text. Simple editor opens.</p>  <p>You can use variables here, click the appropriate button(s) to enter them into the text.</p> <ul style="list-style-type: none"> <li>▪ <b>%TO%</b> – extracts a recipient from the original message (your name or email address in this case) and uses it on the appropriate place.</li> <li>▪ <b>%SUBJECT%</b> – extracts a subject from the original message and uses it on the appropriate place.</li> <li>▪ <b>%SENT%</b> – shows the time (date) when the original message was sent.</li> <li>▪ <b>%READ%</b> – shows the time (date) when the original message was read.</li> </ul> <p>Click the <b>Default</b> button for return to the original (default) text.</p>
Display Address Book names as	<p>Select from the list how you want to have Address Book names shown:</p> <ul style="list-style-type: none"> <li>▪ <i>Numbered structure</i> – reflect server folder structure</li> <li>▪ <i>Folder name only</i> – contact folders are shown in alphabetical order</li> <li>▪ <i>Full folder path</i> – folder names include parent folder (s) names (if applicable)</li> </ul>

- *Manual handling (turned off)* – Address Book names structure is fully controlled by Outlook

## LICENSE AND UPDATES

The screenshot shows the 'License and updates' settings window. It features a tabbed interface with the following tabs: 'Login credentials', 'Advanced', 'Synchronization', 'Appearance', 'License and updates' (selected), 'Logs', and 'About'. The 'License and updates' tab contains three main sections:

- License information:** Displays 'Expires on: Never expires. You can get free upgrades till Monday, October 21, 2019.'
- License dialog:** Includes a 'License dialog:' label and an 'Open license dialog' button.
- Updates:** Includes a checked 'Check for updates' checkbox, 'Current version: 11.1.0.19014 (2014-10-27)', and a 'Check for updates' button.

At the bottom of the window are 'Cancel' and 'Ok' buttons.

Figure 24 – License and updates (Settings page)

Field	Description
Expires on	Displays information about the license's expiration date.
Open license dialog	Opens license dialog, for details, see chapter License.
Check for updates	Tick the box to enable Outlook Sync periodically check version offered by your server at the start of Outlook. For details about updates, please see chapter "Automatic updates".
Current version	Displays exact version of installed Outlook Sync.
Check for updates button	Performs immediate check of the new version at the background.

## LOGS

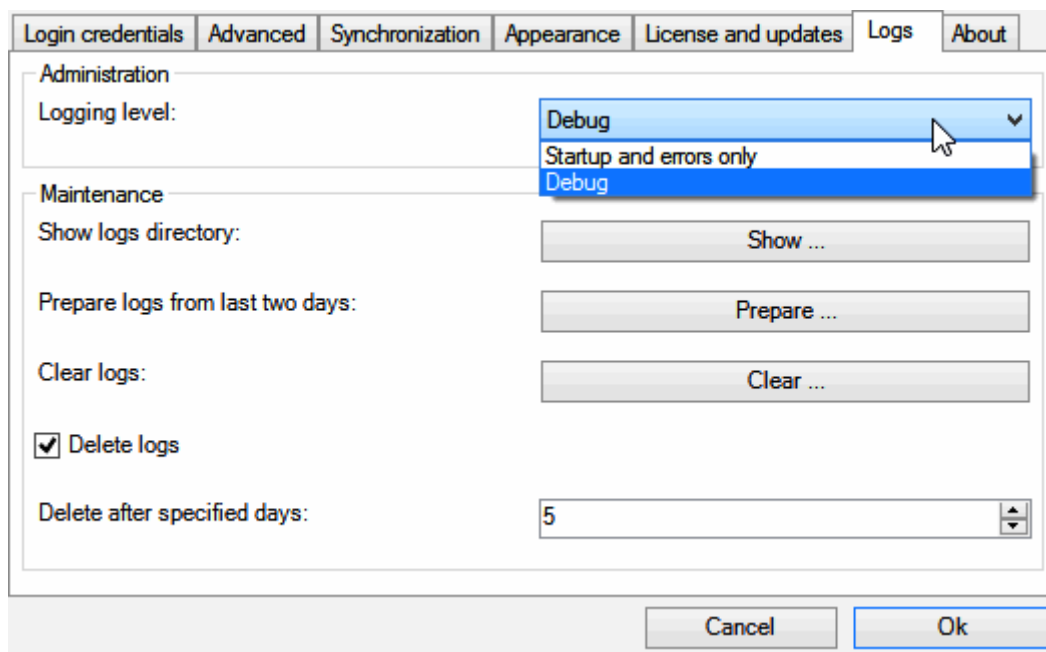


Figure 25 – Logs (Settings page)

Field	Description
Logging level	Select level of logging: <ul style="list-style-type: none"> <li>▪ <i>Startup and errors only</i> – records only minimal amount of logs for basic troubleshooting</li> <li>▪ <i>Debug</i> – provides detailed information about application behavior</li> </ul>
Show log directory	Click the button to open a directory with log files. Here you can find daily files with traffic logs. E. g. <b>07-24-2014.txt</b>
Prepare logs from last two days	Clicking this button allows you to generate and save IceWarp Outlook Sync logs from last two days. In the case of problems, these logs are to be sent to IceWarp Technology (via your administrator).
Clear logs	Click the button to delete content of the current day log file.
Delete logs	Tick the box to enable automatic logs deletion.
Delete after specified days	Enter time period (in days) after what automatically generated logs will be deleted. This does <b>not</b> apply for logs generated by clicking the <b>Prepare ...</b> button.

## ABOUT

Displays brief information about Outlook Sync and by clicking on “Show help”, you can display this help, but you need to have a PDF reader installed.

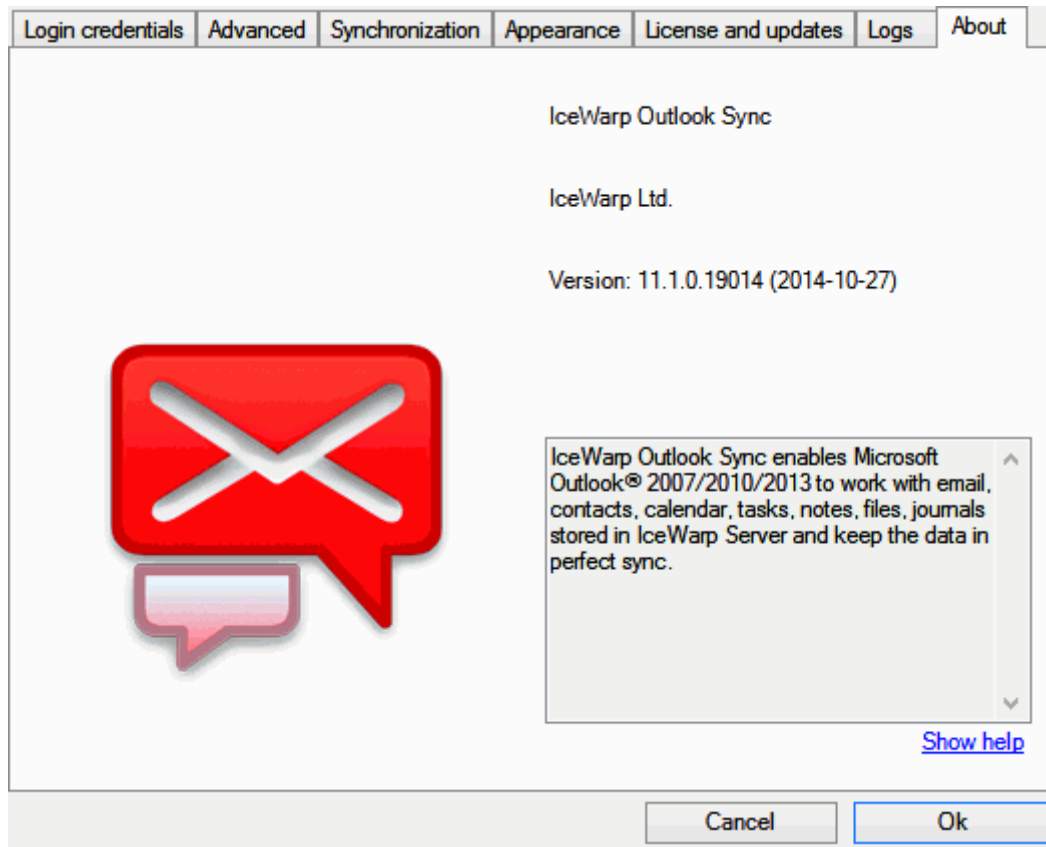


Figure 26 – About (Settings page)

## USING OUTLOOK SYNC IN COMMON SITUATIONS

In the following chapter you will find information about Outlook Sync's features that creates what Outlook Sync is, the set of basic operations between the server and a client.

### FOLDER STRUCTURE SYNCHRONIZATION

Folder structure synchronization is the core of the Outlook Sync; it guarantees that every folder on the server will be equal to the folder in Outlook. It synchronizes name, position and permissions granted to you.

#### WHAT IS FOLDER STRUCTURE

Folder structure is a folder tree in the pane on the left side of your Outlook. It contains all folders that are on the server. If you create, delete or rename a folder in Outlook, this operation is reflected on the server and vice versa.

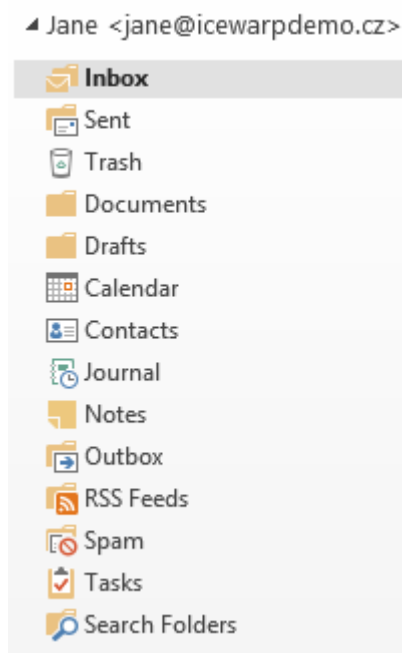


Figure 27 – Example of folder structure

## HOW TO CONTROL FOLDER STRUCTURE SYNCHRONIZATION

Folder structure synchronization is performed every time Outlook starts, and then in the defined interval; which is by default set to 60 minutes. And it is planned every time you perform an operation (move, create, delete, rename) with a folder. You do not need to synchronize folder structure very often, it is very performance consuming.

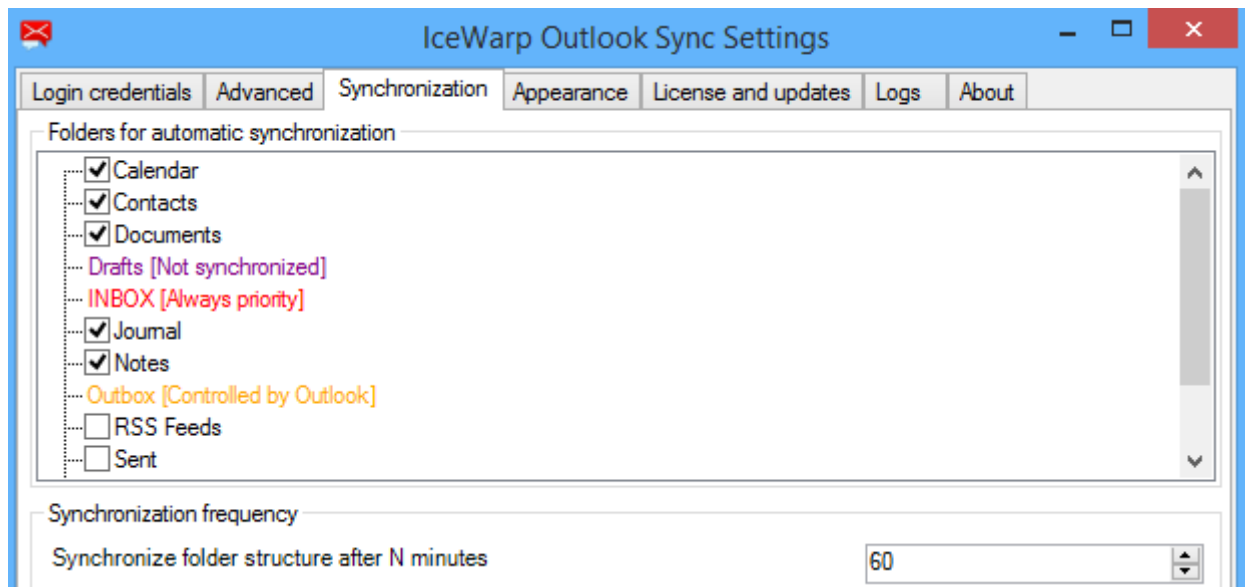


Figure 28 – Folders selected for automatic item synchronization

*It is not recommended to set folder structure synchronization interval below 60 minutes, because it may cause performance slowdown on the server. In normal usage 60 minutes is enough.*

## MANUAL INITIATION OF FOLDER STRUCTURE SYNCHRONIZATION

You can initiate folder structure synchronization by clicking on “Folder Sync” button in the “IceWarp Sync” ribbon.

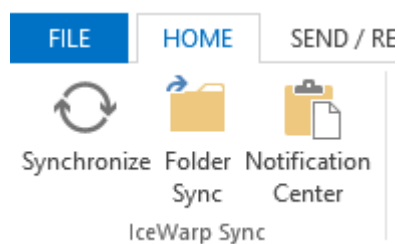


Figure 29 – IceWarp Outlook Sync control ribbon

## ITEMS SYNCHRONIZATION

Item synchronization is related to the content of each particular folder. If you create, move or delete item in Outlook's folder, it reflects this change to the server and vice versa.

## WHAT IS ITEM

Item is any content of any folder, it is mail, contact, event, note, journal or task.

## ITEM SYNCHRONIZATION TYPES

IceWarp Outlook Sync does not idle, but polls server for changes in predefined intervals instead. Some folders need to be synchronized more often than the others, amongst them is for example INBOX. But some less frequently used folders do not need to be synchronized so often.

Outlook Sync offers you ability to synchronize some folders more frequently using “priority synchronization” and some less frequently using “standard synchronization”.

## STANDARD SYNCHRONIZATION

When you create profile and perform first folder synchronization, all so called default folders are selected for standard synchronization. These folders are “Calendar” for your events, “Contacts” for your contacts and distribution lists, “Documents” for your files, “Journal” and “Notes”.

## PRIORITY SYNCHRONIZATION

If you want to synchronize some folders more frequently, you can select them for “Priority sync”. Right click on the folder and select “Priority sync”. INBOX is always selected for priority synchronization.

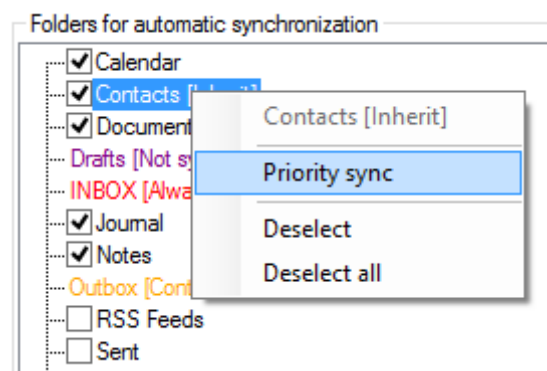


Figure 30 – Priority synchronization selection

## SELECTING FOLDER FOR STANDARD SYNCHRONIZATION AND INHERITANCE

You can select folder for standard synchronization by clicking on the checkbox. You may also want to select all its subfolders, to select them use right click and select “Select all” option. Since then, subfolders of such folder will inherit its status. If you create new subfolder, it will inherit parent’s status and will be also synchronized.

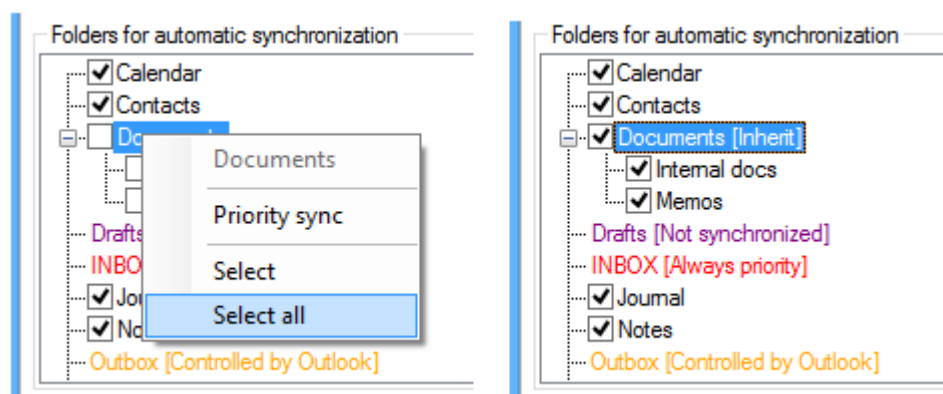


Figure 31 – Inheritance selection

## HOW TO CONTROL ITEMS SYNCHRONIZATION

In the synchronization tab in settings you can define how often folders will be synchronized.

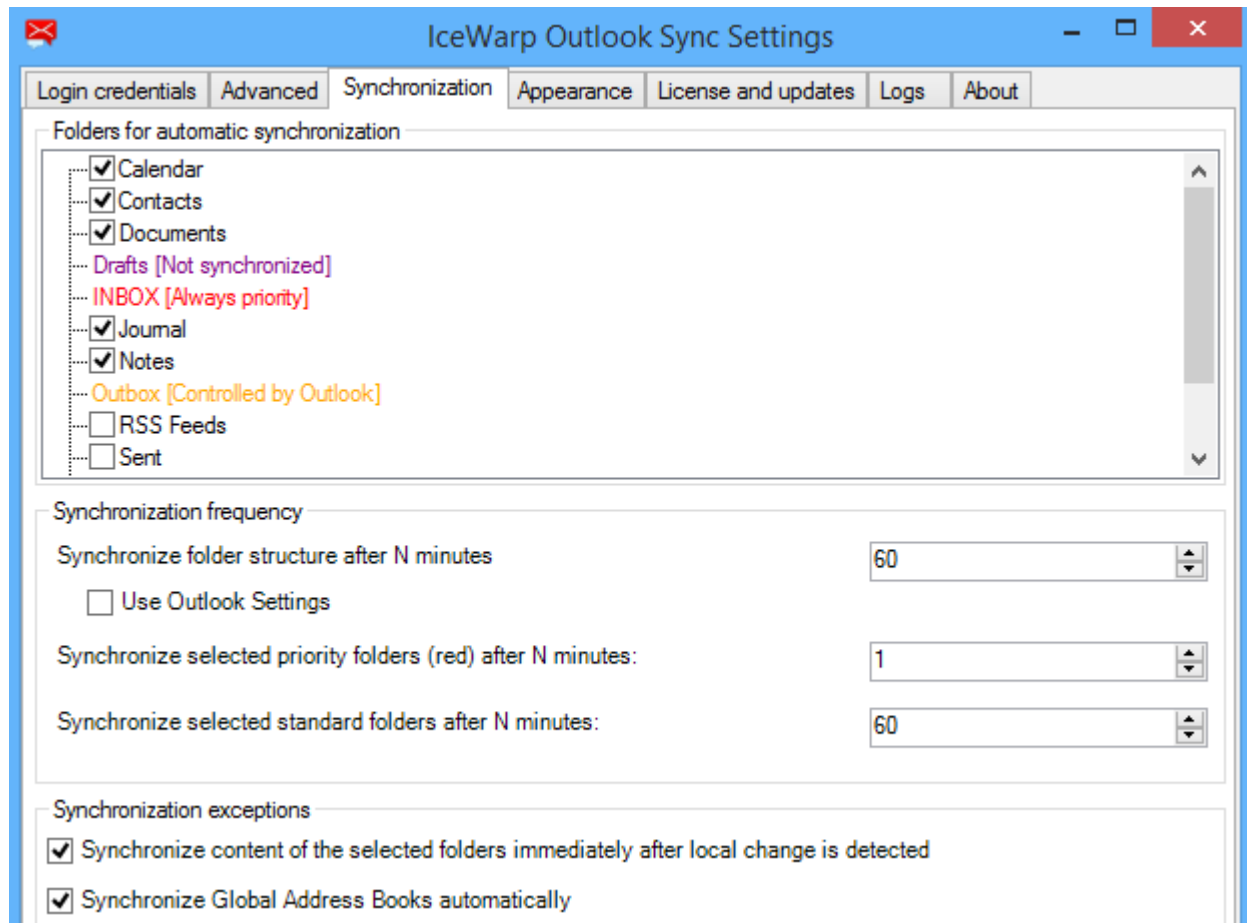


Figure 32 – Controlling synchronization intervals

Default interval for standard synchronization is set to 60 minutes and for priority synchronization it is 1 minute. Folders items are synchronized when you enter the folder and also when you leave the folder in order to catch the most recent changes.

*It is not recommended to set interval of standard synchronization to low value, and is recommended to keep the default one.*

## MANUAL INITIATION OF ITEMS SYNCHRONIZATION

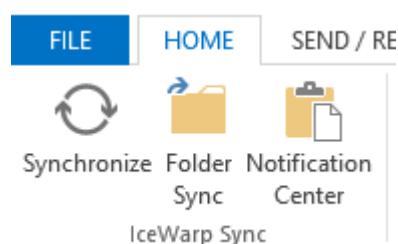


Figure 33 – Outlook Sync manual controls

You can initiate folder items synchronization by clicking on “Synchronize” button in the “IceWarp Sync” ribbon. It starts items synchronization on the selected folder.



---

## SYNCHRONIZATION OF SPECIAL FOLDERS

Some special folders differ in synchronization intervals and some cannot be synchronized at all, read next paragraphs to find out more.

### DRAFTS

---

Folder “drafts” contains mails that you began to write but have not finished them yet. Unfortunately content of this folder cannot be synchronized because of internal Outlook handling of this folder.

### OUTBOX

---

Folder “outbox” contains mails that are to be sent but have not been rolled out yet. This folder is client-only related and as such its content is not synchronized.

### GLOBAL ADDRESS BOOK

---

Global Address Book or also called Global Address List (GAL) is a server-wide contact list. It contains emails of entire domain. Due to its complexity, it is not possible to synchronize GAL sooner than every one hour. However due to its nature, very low update frequency, this interval does not limit normal use in any way.

*Global Address Book can be synchronized only every one hour, this interval cannot be overridden.*

## IGNORE LIST

Sometimes, item download from a server to your email client can fail. When download fails three times, this item is included into an ignore list. Your email client does not attempt to download these items (emails, invitations, etc.).

After some time, the problem with this item(s) can be solved. In this case, you may want to download missing items. Select the appropriate folder, right-click its name and select **Clear Ignore List**. Missing items are downloaded.

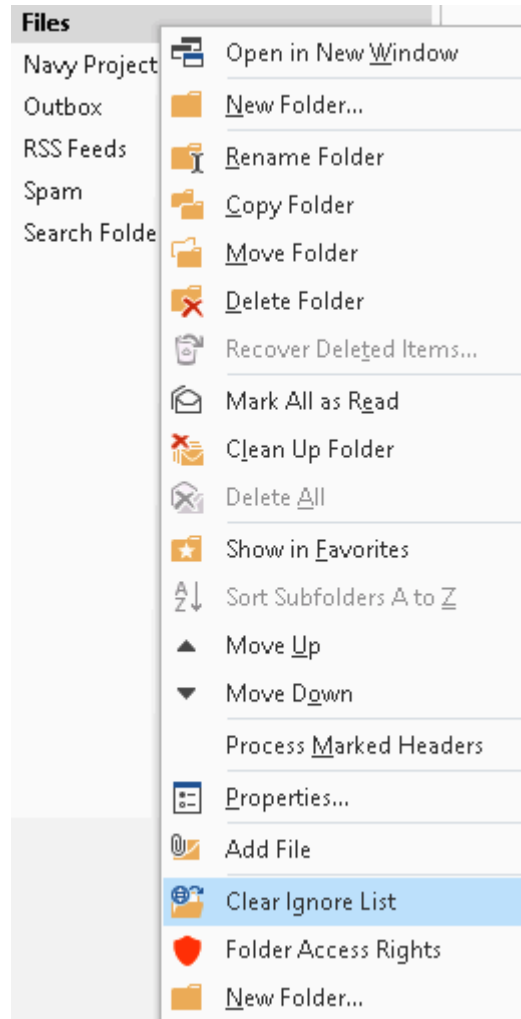


Figure 34 – Clearing ignore list

## SHARING YOUR FOLDER OR ACCOUNT TO SOMEONE ELSE

### SHARING FOLDER

You may want to share content of your folder to someone else, e.g. coworker, or alternatively you want to remove sharing permissions or review them, follow next few steps.

## STEP 1 – SELECTING A FOLDER

To enter configuration of sharing select folder you want to share and use right click; then select “Folder Access Rights”.

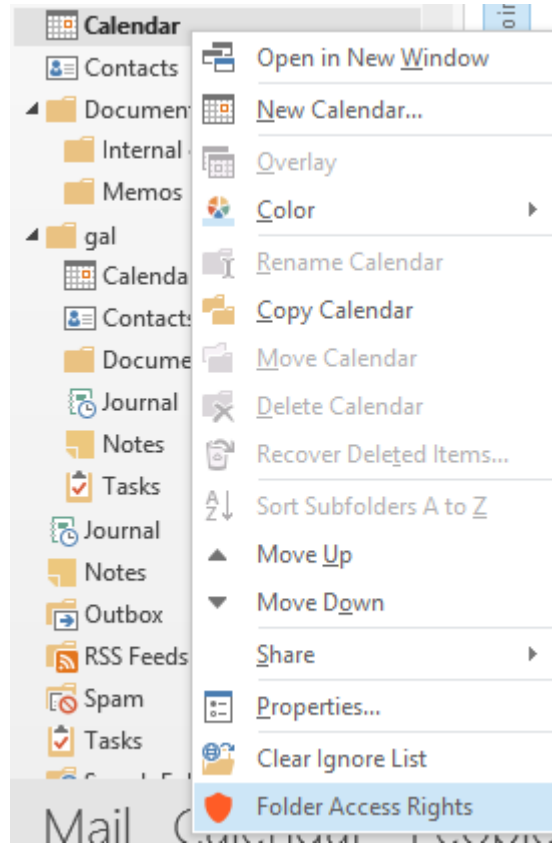


Figure 35 – Folder Access Rights

## STEP 2 – ACCESS RIGHTS DIALOG

Folder Access Rights dialog displays all already assigned permissions, allows them to be removed and also adding new. If you click on the email, dialog displays all permissions granted to this particular user.

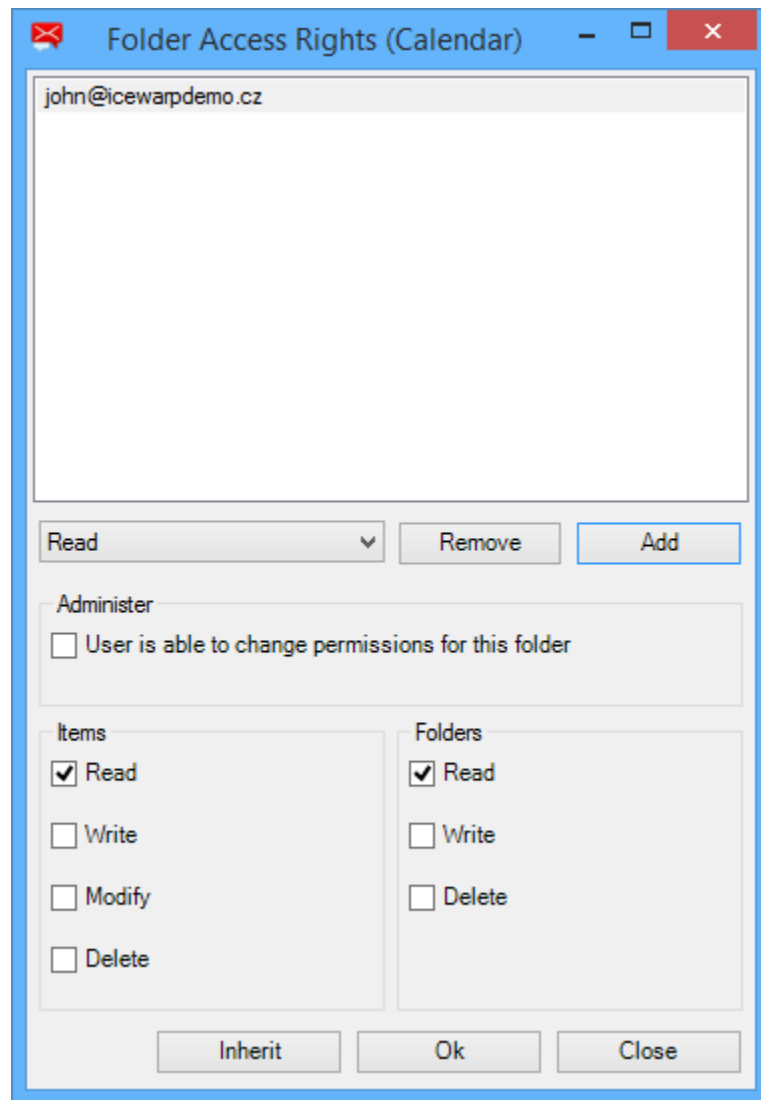


Figure 36 – Folder Access Rights

## PERMISSIONS

You can grant permissions to the user by ticking them individually, or you can use predefined sets. If you click on the combo box you will get a list of them. If you set “None” user will not have any permission, if you set “Custom” you can set permissions individually.

“All” permissions set ticks all individual permissions, excluding administer. “Full” permissions ticks all individual permissions, including administer.

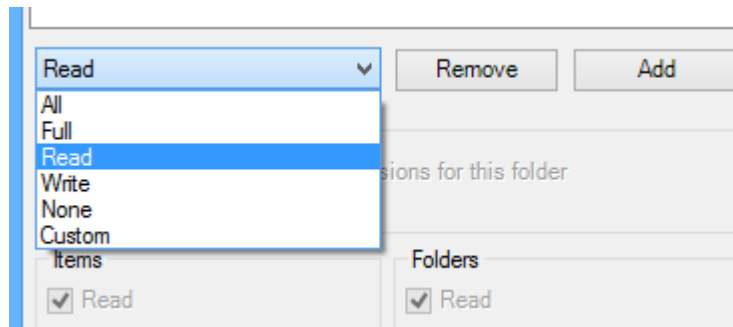


Figure 37 – Permissions selector

Access Right	Description (Item/Folder)
Administer	Full rights including the one to change permissions for this folder.
Read	Right to see items in the folder / folder itself respectively.
Write	Right to create/add new items into the folder / create new subfolders respectively.
Delete	Right to delete items included in the folder / delete subfolders respectively.
Modify	Right to modify items in the folder.

## ADDING NEW USER YOU SHARE TO

To add new user you want to share to, click on “Add” button. It displays a new dialog allowing you to select user.

## REMOVING USER YOU SHARE TO

To remove already added user select email in the dialog and click on “Remove” button.

## INHERITANCE

When granting someone access to your folder you may want to use the *Inherit* button. This applies in the case the folder you want to share is a child folder of another folder already shared.

It is not necessary to choose the same access permissions for this folder. Just click this button. The ACL dialog gets grayed and the *Cancel Inheritance* button appears. (Use it to change access permissions.)

### STEP 3 – SELECTING A USER YOU SHARE TO

In the Select User dialog you can choose user from two preloaded lists; suggested and subscribed contacts, select user from Outlook address book or manually type email address of the user you want to share your folder.

Suggested contacts – all users who share any of their folders to you are shown.

Suggested contacts – all users who share any of their folders to you and you already subscribed them are shown.

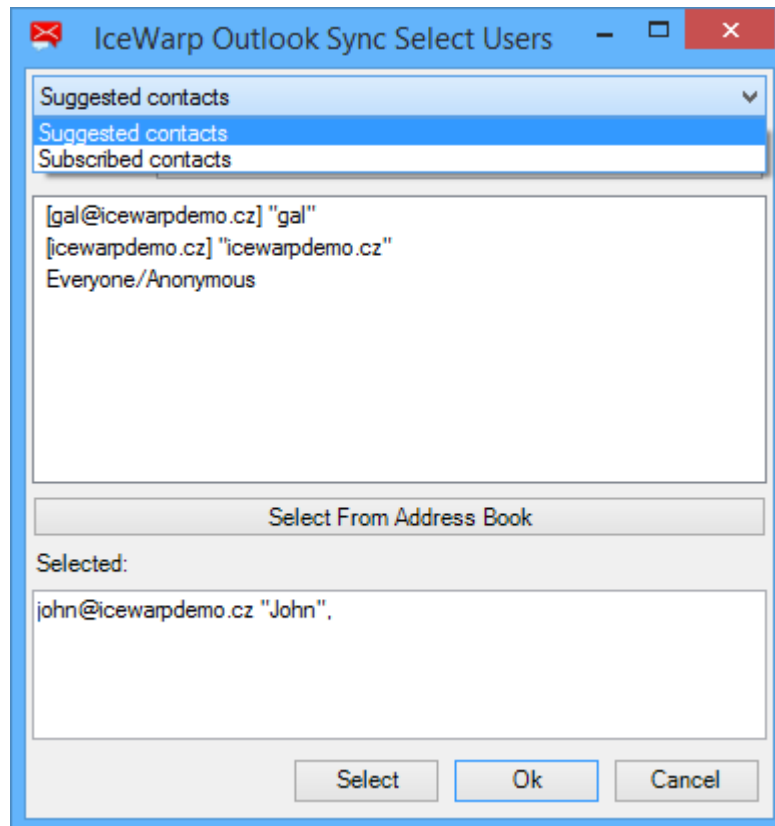


Figure 38 – Selecting users

*Beware of "Everyone/Anonymous", it means you would share your content to everyone.*

## SELECTING USER FROM OUTLOOK ADDRESS BOOK

You can use Outlook Address Book to select user, by clicking on button “Select From Address Book”. Standard Outlook dialog appears.

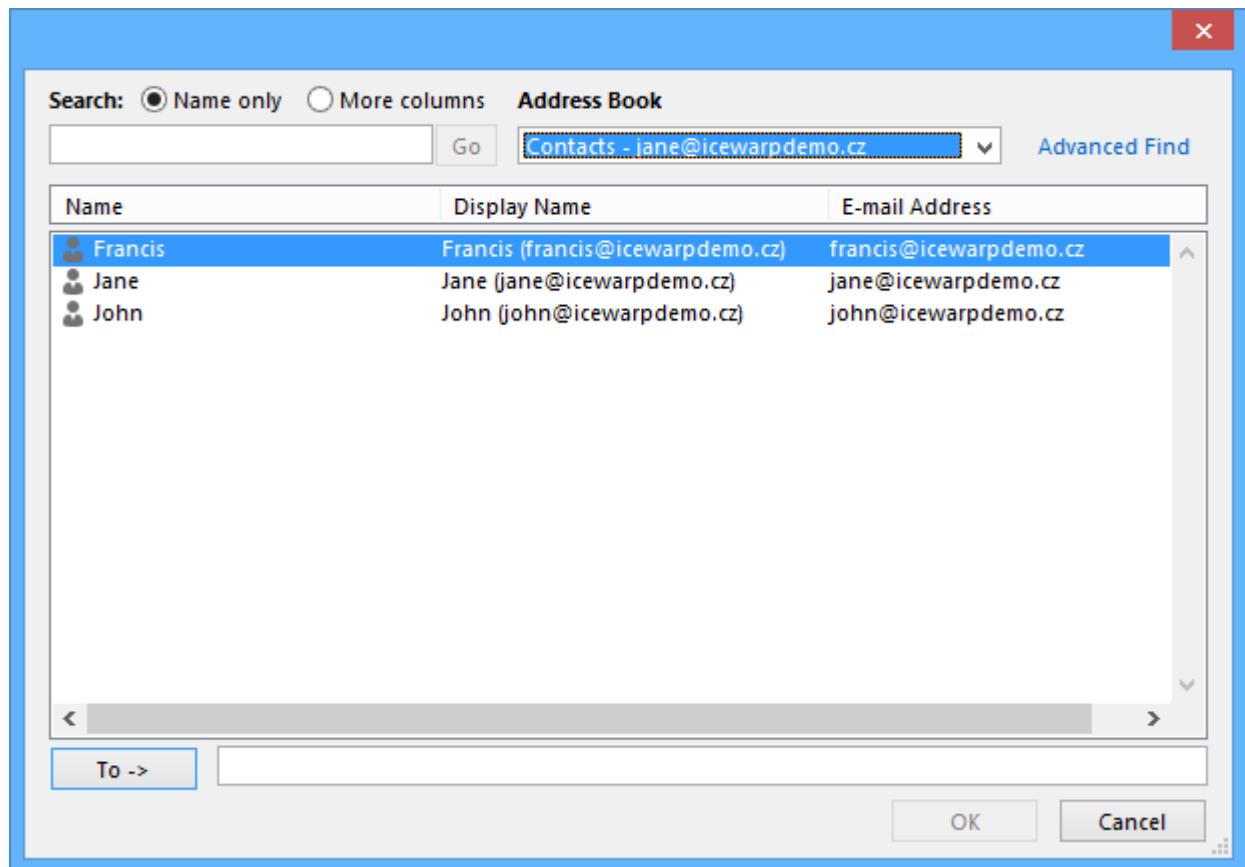


Figure 39 – Outlook Address Book

## SCENARIO OF SHARING

User Jane wants to share her calendar to John, so he is able to see her events. Jane right clicks on the “Calendar” folder and selects “Folder Access Rights”. This action displays configuration dialog that is empty. Jane clicks on “Add” button so she can add John’s email address. Because she does not know her coworker’s address, she enters address book by clicking on “Select From Address Book”. An Outlook dialog appears with the addresses; Jane finds John’s address and double-click on that entry. Then she presses “OK”; John’s address now appears in the “Selected” textbox area. She presses “OK” again and John’s address is now defined in a permission field. Jane wants to grant only a read permission, so all she needs now is to select “Read” in the combo box and press “OK”. Server is contacted and permission is set; John can now see Jane’s calendar.

## SHARING ACCOUNT

If you want to share entire account to someone else, right click on the root folder of your account and select “Account Access Rights”; then continue with Step 2 – Access Rights dialog. The situation is same as for the particular folder, except you are sharing your entire account.

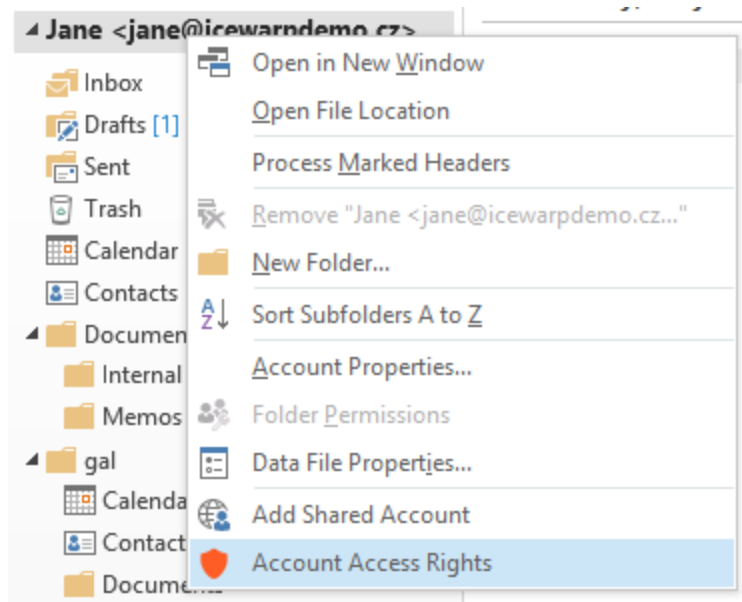


Figure 40 – Account Access Rights

## HOW TO STOP SHARING YOUR FOLDER OR ACCOUNT TO SOMEONE ELSE

Open Access Rights Dialog on the folder or on your root account in the folder tree and select user you want to stop sharing; then click on “Remove” button. This will initiate removal of permissions previously granted to this user.

## SOMEONE IS SHARING HIS/HER FOLDER OR ACCOUNT TO YOU

In the case someone grants access either to a folder or account to you, you obtain an information e-mail. Clicking this message opens the **Access notification** dialog.

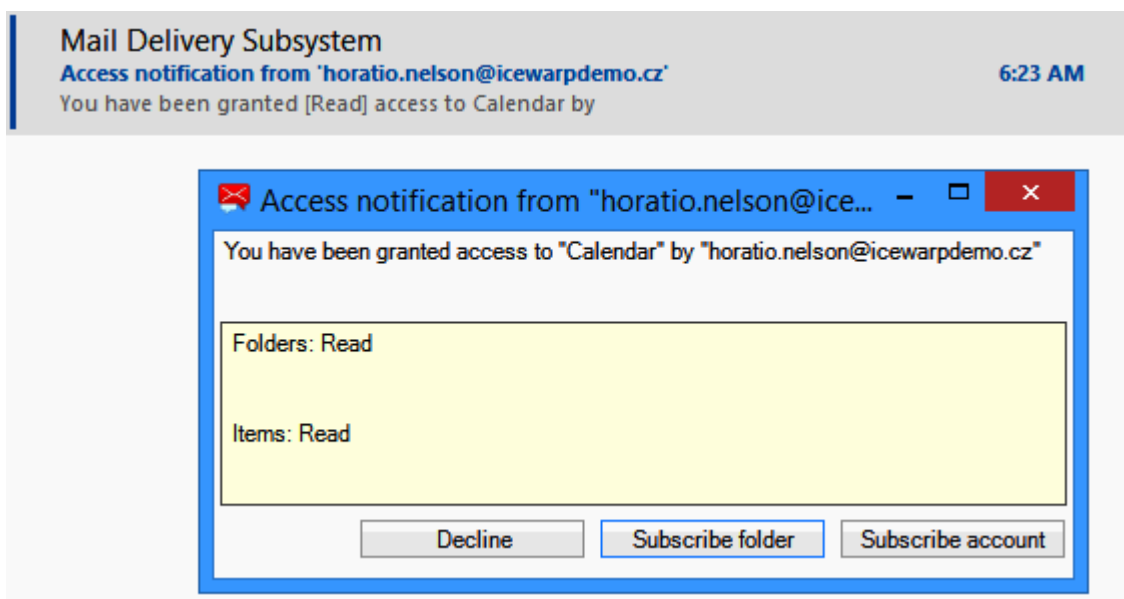


Figure 41 – Permission granted to you



Field	Description
Decline	<p>Click the button to decline subscription. The information e-mail is deleted.</p> <p><i>NOTE: If you want to decline subscription but keep the information email, click the closing cross in the right-hand upper corner.</i></p>
Subscribe folder	<p>Click the button to subscribe the folder you have been granted access to. Your permissions are shown in the text field.</p> <p><i>NOTE: In the case you have been granted access to a whole account, this button is grayed.</i></p>
Subscribe account	<p>Click the button to subscribe the account you have been granted access to. Your permissions are shown in the text field.</p> <p><i>NOTE: In the case you have been granted access only to a single folder (or some but not all account folders), you can still click this button. This is useful in the case, you expect the account owner will grant access to other folder(s) to you in future.</i></p> <p><i>But in this moment, it does not give you any rights to other account folders.</i></p>

## REMOVING SHARED FOLDER OR ACCOUNT

If you want to remove folder or account that was shared to you, just click on the shared folder or shared account and click on “Remove Shared Folder” or “Remove Shared Account”.

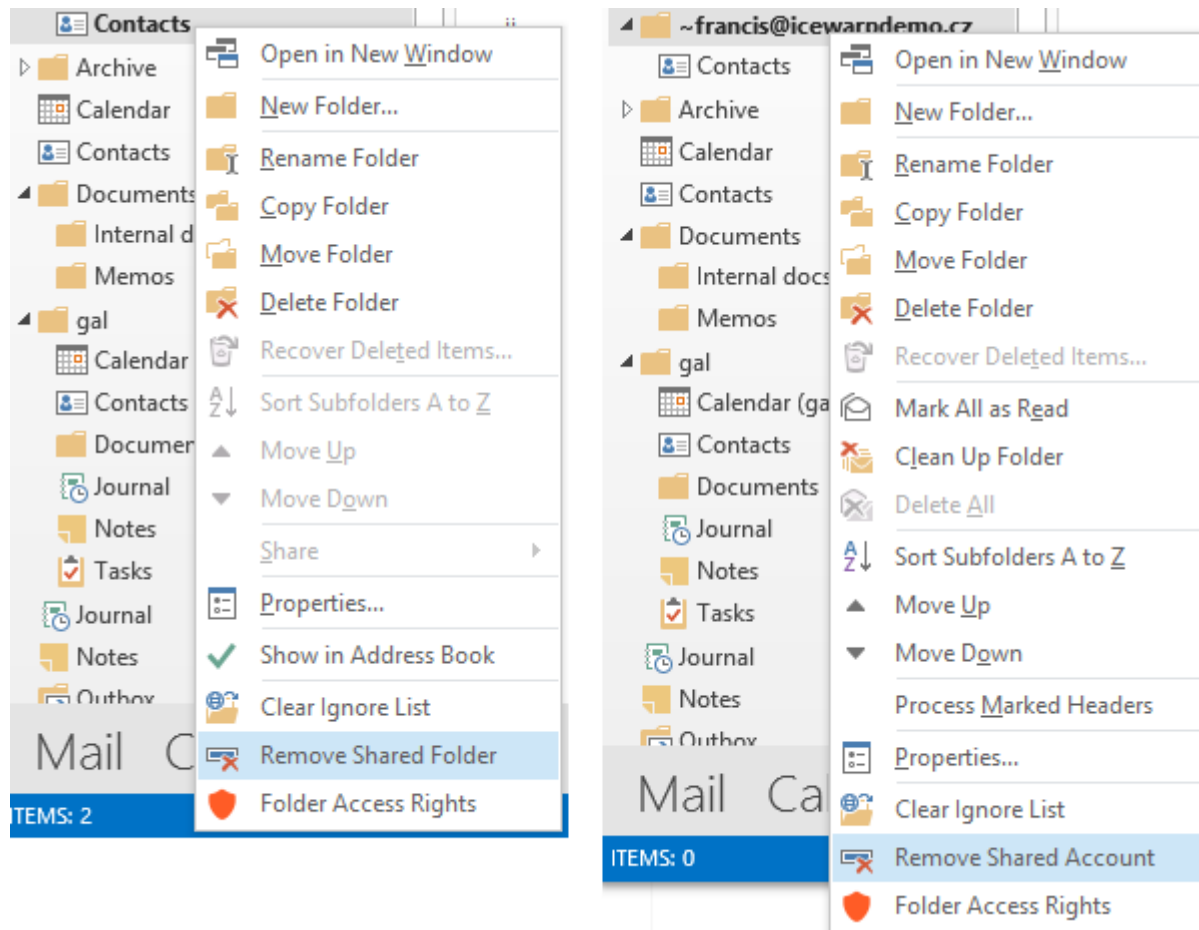


Figure 42 – Removing shared folder and shared account

## FREE/BUSY

When you are planning a meeting with invited attendees, you need to know when they have time; when they are free or busy. Outlook helps you with a feature called “free/busy”, it contacts remote server and gets attendee’s schedule. This schedule is then displayed in the attendee’s list.

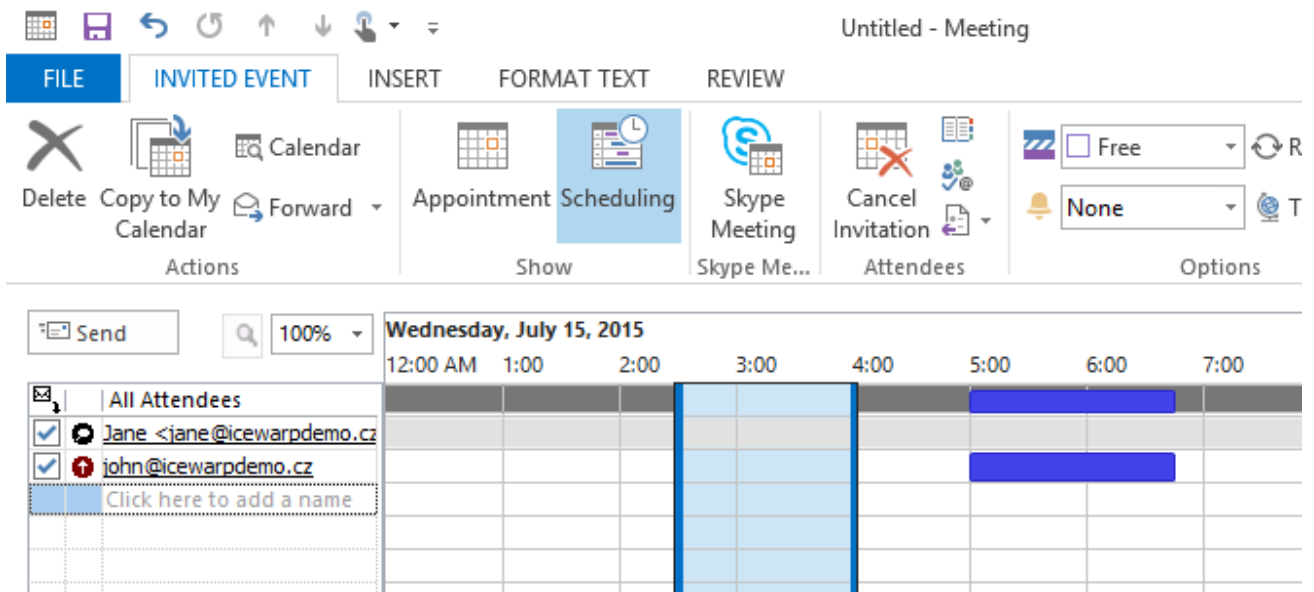


Figure 43 – Free/Busy example

## SETTING GLOBAL FREE/BUSY LINK

Outlook must be able to retrieve Free/Busy information from the link provided by the server. It can either be inside the contact, or can be set globally for all contacts. If you setup global Free/Busy link in **File ~ Options ~ Calendar ~ Free/Busy Options...** Outlook queries server specified in this link for a Free/Busy information every time for each contact.

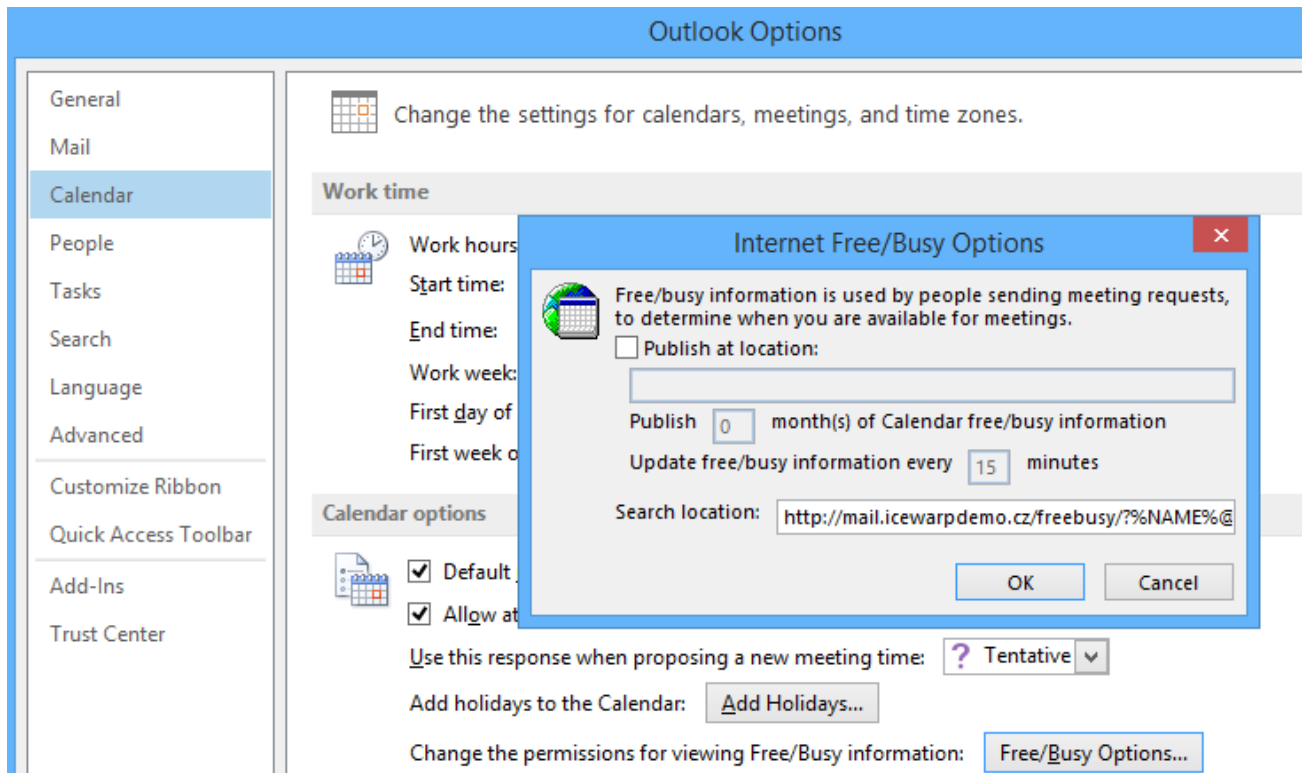


Figure 44 – Free/Busy settings

<http://mail.icewarpdemo.cz/freebusy/?%NAME%@%SERVER%>

## USEFUL FEATURES OF OUTLOOK SYNC

In the following chapter you will find information about features of Outlook Sync that is an addition to Outlook's feature set.

### GLOBAL ADDRESS BOOK

Global Address Book is an Outlook's feature displaying all contacts from contacts folders that are selected to be shown in it. By default, the only folder is your personal Contacts folder; Outlook Sync automatically adds all public folders that are shared to you and are also GALs.

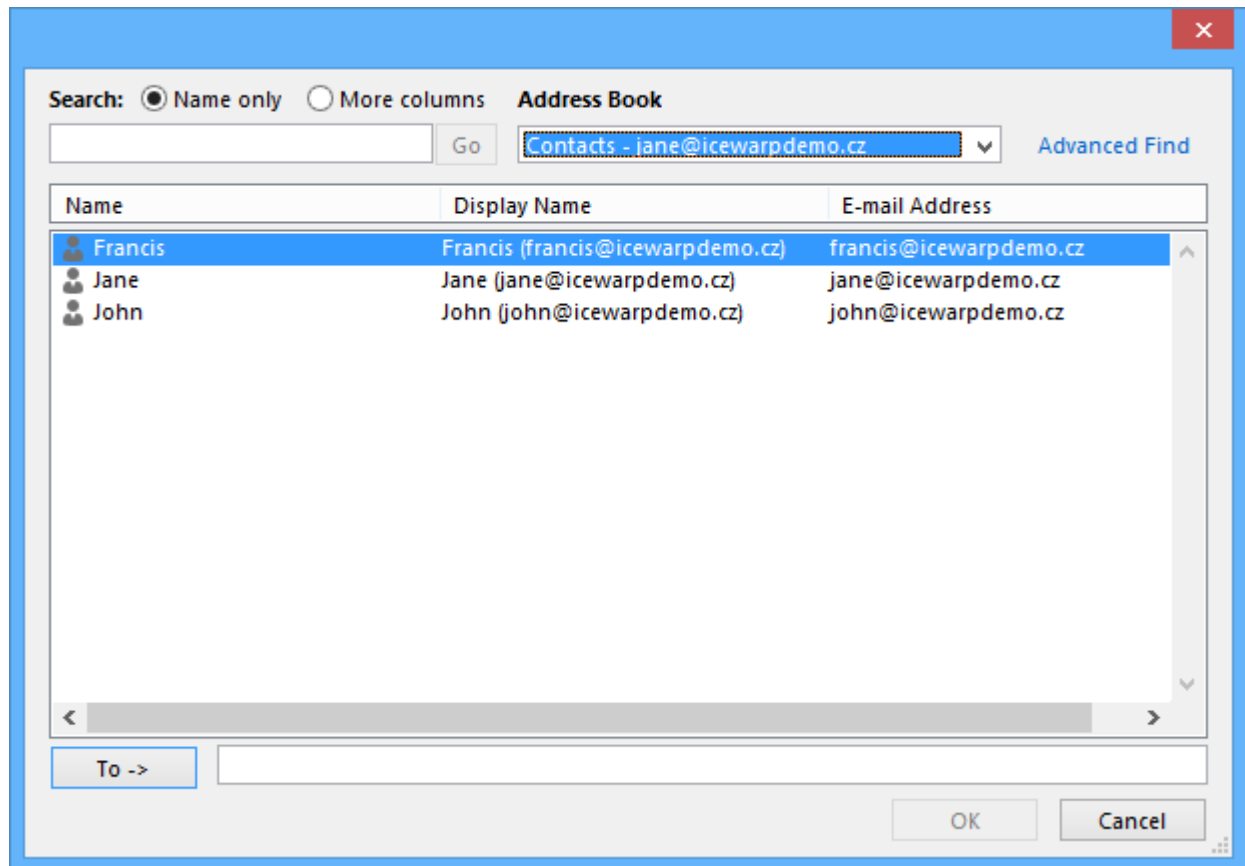


Figure 45 – Outlook Address Book

## ADDING CONTACT FOLDER TO ADDRESS BOOK

If you want to add all contacts from one folder to a common address book. Just right-click this contact folder and select the *Show in Address Book* item. You do not need to do this in case of Global Address List folders; it's being done automatically.

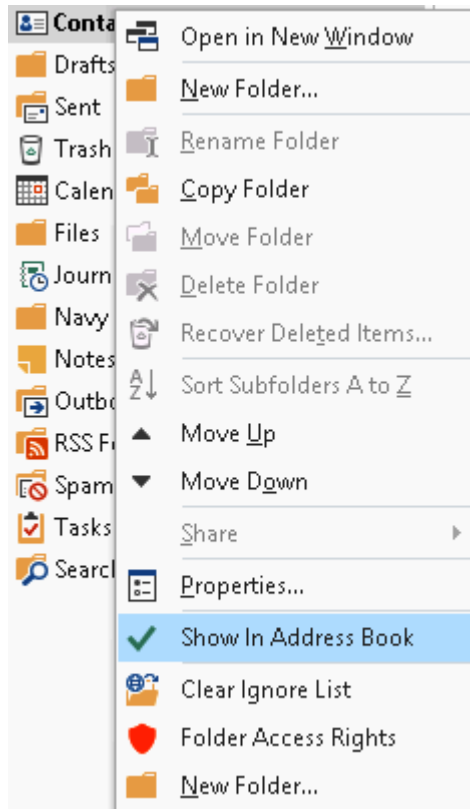


Figure 46 – Show in Address Book dialog

## SORTING ADDRESS BOOK ENTRIES

If you have more contacts folders that are in Address Book, by default they will be displayed without any structure; just folder names. You may get lost in what folder you are; fortunately Outlook Sync is able to reorganize Outlook's native sorting.

You can change how items in Address Book are sorted in the **Settings ~ Appearance** tab.

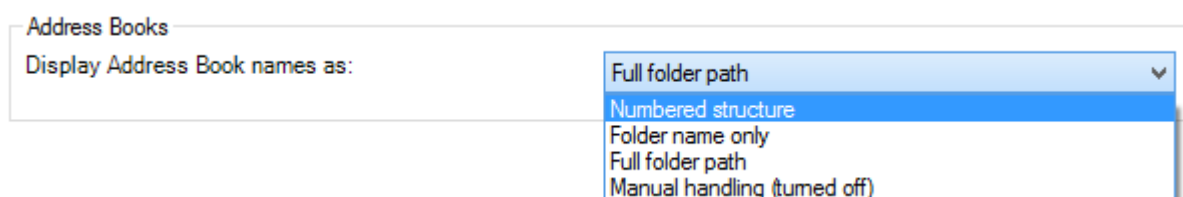


Figure 47 – Display As selection in Address Book appearance

*Please note, that after you change "Display As" in the settings, Folder structure synchronization must happen to make this settings effective.*

## NUMBERED STRUCTURE

Numbered structure is the closest “display as” method to the Outlook and Microsoft Exchange native behavior. Numbers are used as a sorting prefix and spaces to display levels. This is a recommended setting.

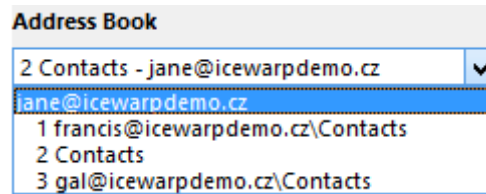


Figure 48 – Numbered structure Address Book layout

## FOLDER NAME ONLY

Folder name only is in fact Outlook’s native behavior; it displays only the folder name. You cannot distinguish between folder locations.

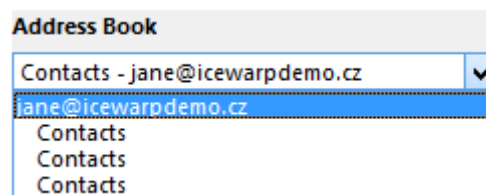


Figure 49 – Folder name only Address Book layout

## FULL FOLDER PATH

Full folder path displays full IMAP address of the folder. You have a good overview about the folder location but some folders with longer names might not fit to the Outlook’s window.

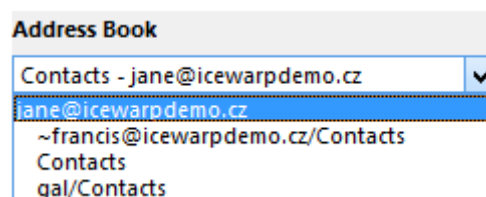


Figure 50 – Full folder path Address Book layout

## MANUAL HANDLING (TURNED OFF)

Manual handling means that Outlook Sync does not handle contacts folders Address Book prefixes. This is a default setting.

## SIP CALLS THROUGH THE SERVER

Outlook Sync is able to dial a remote user via SIP. To use this feature you need to have a SIP phone connected to IceWarp server; this phone can be either hardware or software and needs to understand “REDIRECT” command.

## HOW TO MAKE A CALL

Locate and select contact you wish to call, select “Call contact” from the right-click menu.

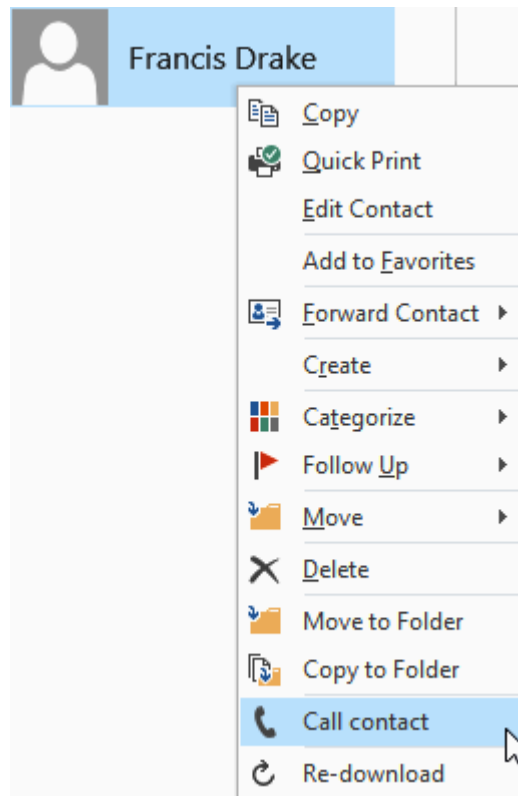


Figure 51 – Calling contact

Select a mail address you want to dial; you will see them in the drop-down menu in “Call contact” dialog. Then your SIP client will start to ring, answer it. After a couple of seconds the other person’s SIP client will be contacted and your conversation can start.

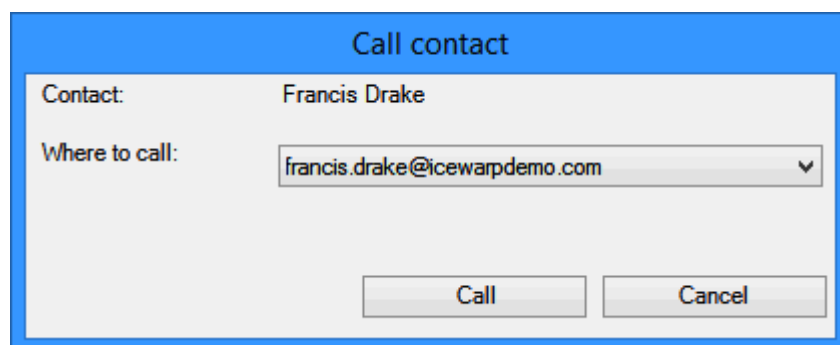


Figure 52 – Selecting email address for a call

## HOW IT WORKS

- Outlook Sync contacts IceWarp server with a request to call selected contact’s address
- Server dials your SIP phone/client with a redirect request
- As soon as you answer ringing, your SIP phone/client should redirect the call to the caller

*Please note that not every SIP phone/client is able to handle “REDIRECT” request. If in doubt contact your server administrator for more information and help.*



## READ RECEIPTS HANDLING

Outlook Sync has a unique feature of a customized read receipts. You can modify what Outlook is going to send.

### HOW TO ENABLE READ RECEIPT HANDLING

To enable Outlook Sync read receipt handling, you need to turn off Outlook's own handling first. Go to the **Options ~ Mail ~ Tracking**; there select "Never send a read receipt".

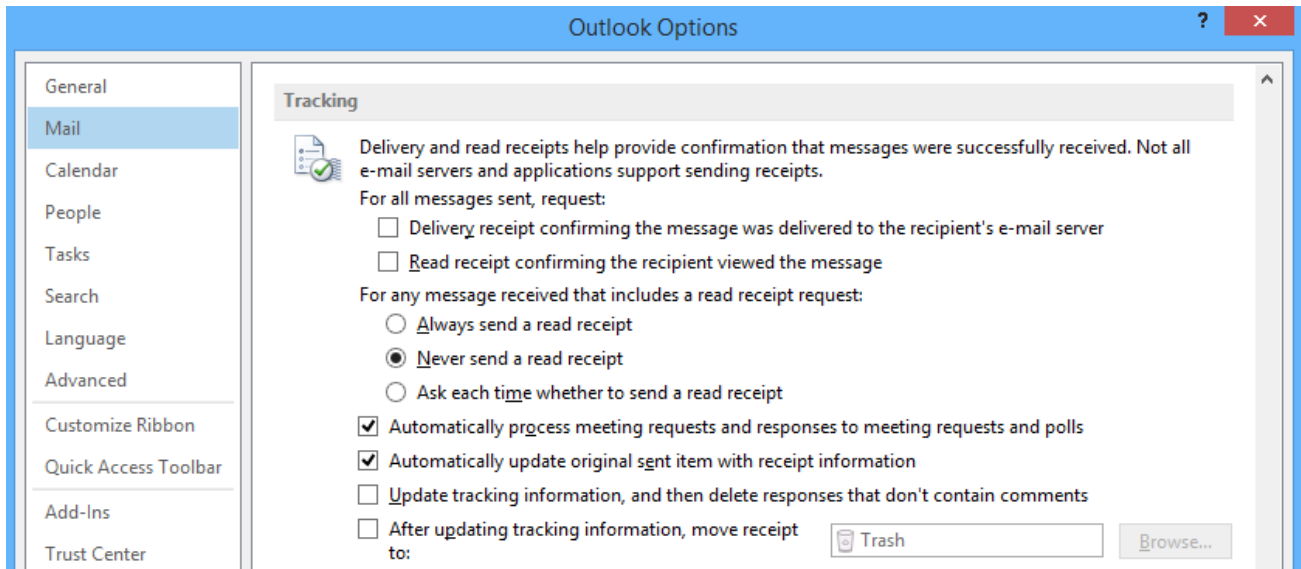


Figure 53 – Outlook Read Receipt handling settings

After you turn off Outlook's handling, go to the Outlook Sync's settings and in Appearance tab enable "Handle read receipts" checkbox. From now on, Outlook Sync will handle all incoming read receipt requests.

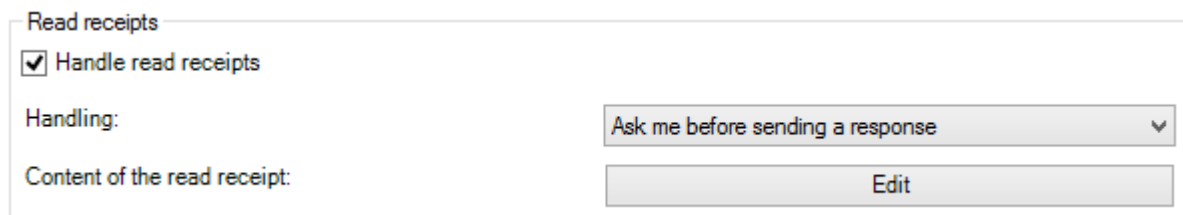


Figure 54 – Outlook Sync Read Receipt handling settings

## EDITING READ RECEIPT TEXT

If you click on “Edit”, a very simple read receipt editor appears. You can then modify what is going to be a text of the read receipt.

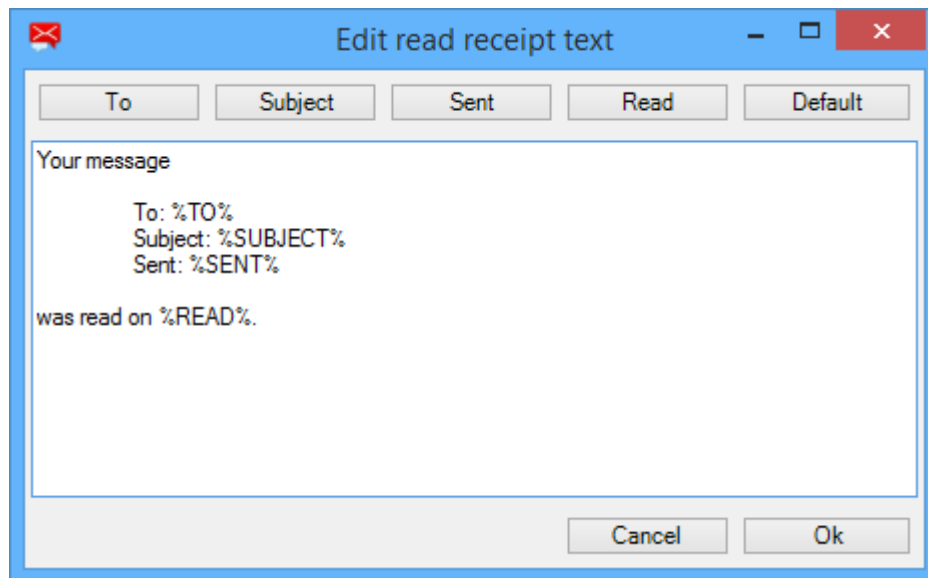


Figure 55 – Read Receipt editor

For additional details about particular features of read receipt editor, refer to the chapter Appearance.

## PROVISIONING SYSTEM

Provisioning system is a feature allowing administrator to have a limited control over the settings of particular Outlook Sync users. Not only that administrator is able to unify settings across the organization, he can also quickly react to unexpected situation or easily restore settings of the user with troubles.

### VIEW OF THE ADMINISTRATOR

For details about the administrator's options about provisions, refer to the IceWarp Server documentation. We refer to this feature only to illustrate impact to the Outlook Sync user. On Figure 56 – IceWarp server settings of Outlook Sync provisions you can see a setting of priority synchronization interval set to 5 minutes.

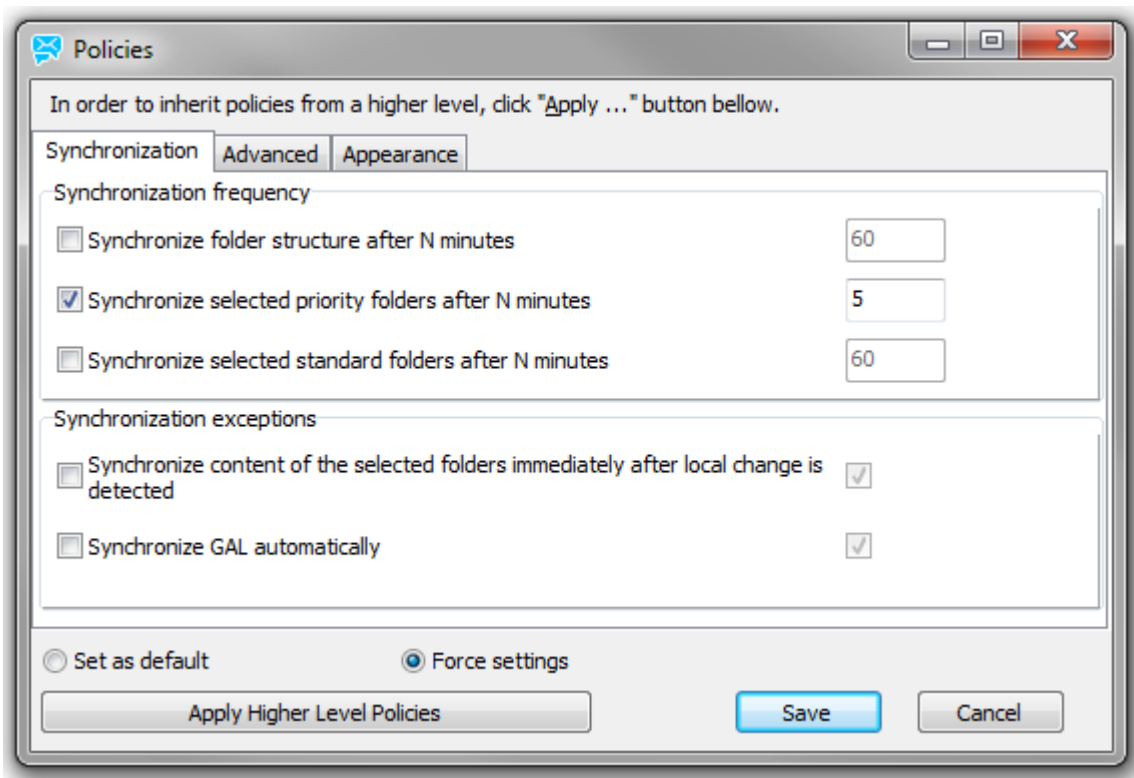


Figure 56 – IceWarp server settings of Outlook Sync provisions

### VIEW OF THE OUTLOOK SYNC USER

If your server applies provisioning policy, you may see some of the settings grayed out. See Figure 57 – Example of provisioned settings in Outlook Sync as an example of such situation. It means that this particular setting is being pushed by the server and you cannot change it.

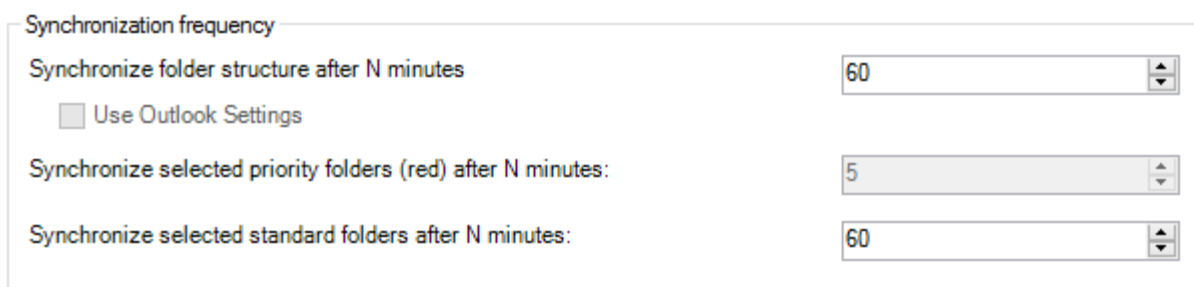


Figure 57 – Example of provisioned settings in Outlook Sync

*If you are in trouble with a particular provisioned setting, contact your administrator to remedy this issue; once provisioned, user cannot do anything about that.*

## NOTIFICATION CENTER

Notification center allows you to view what is happening between the server and your Outlook. You can show notification center dialog by clicking on “Notification Center” button in IceWarp Sync ribbon.

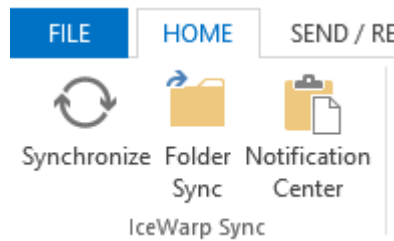


Figure 58 – Outlook Sync manual controls

## CURRENT SITUATION

Current situation window displays actual situation, you can quickly review a synchronization row as well as see how many messages are synchronized from the server or vice versa.

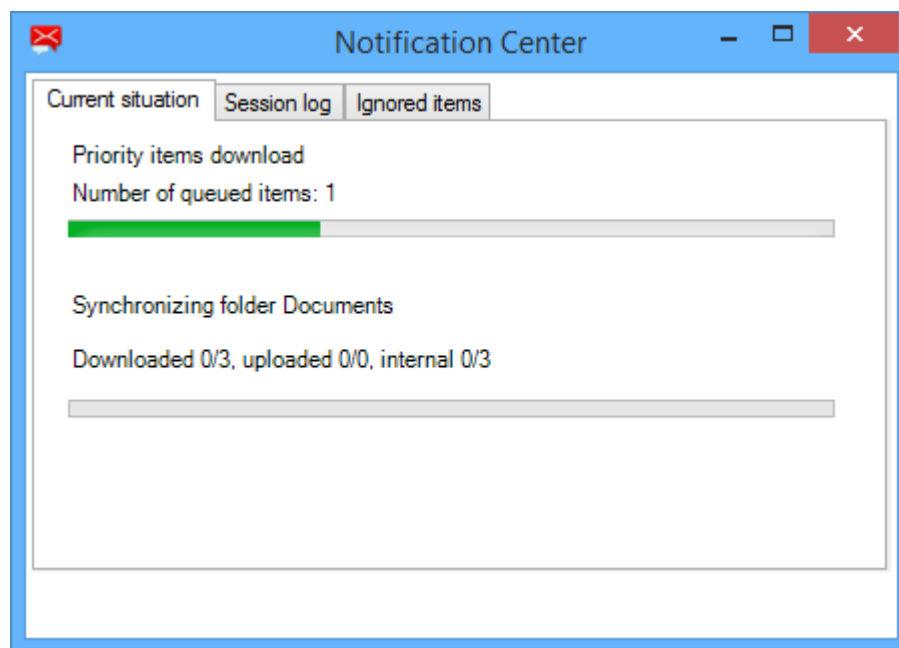


Figure 59 – Notification Center, current situation tab

Downloaded X/Y: **Y** is the number of messages in the synchronization queue, waiting to be downloaded from the server, **X** is the number of currently downloaded messages (IceWarp Server to IceWarp Outlook Sync).

Uploaded X/Y: **Y** is the number of messages in Outlook, waiting to be appended to the server, **X** is the number of currently appended messages (IceWarp Outlook Sync to IceWarp Server).

Internal X/Y: **Y** is the number of messages already downloaded from the server and waiting to be imported to Outlook, **X** is the number of currently imported messages (IceWarp Outlook Sync to Outlook).

## SESSION LOG

Session log can hold 200 events. Each event represents one action of Outlook Sync; for example “*Item synchronization*” of folder INBOX, or procedural actions as “*Database consistency check*” at the start of Outlook. Some events contain more information; you can recognize “*(details)*” at the end of the description, you can double click on them to view more information.

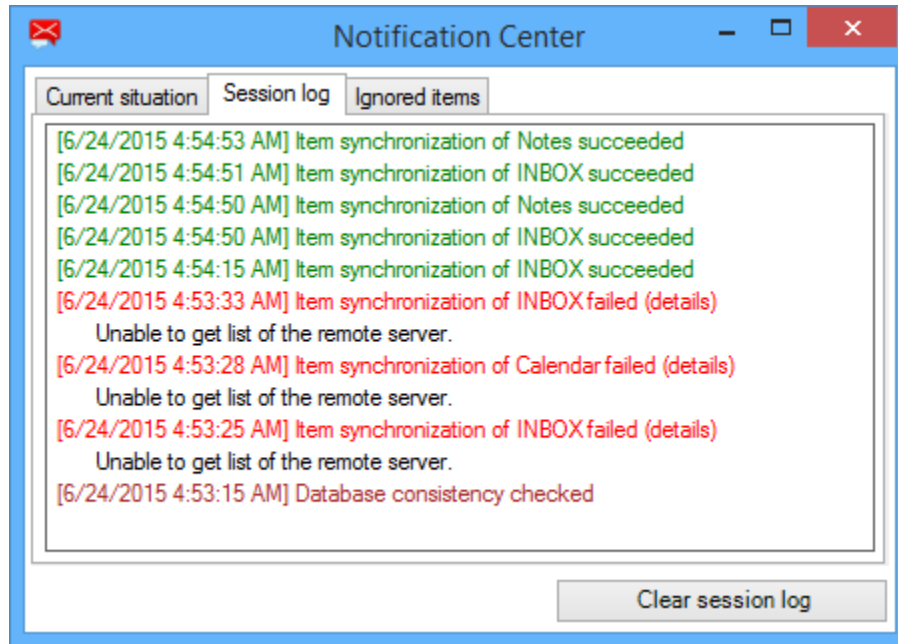


Figure 60 – Notification Center, session log tab

## IGNORED ITEMS

Ignored items tab contains information about ignored items in all folders, where there are some. You can delete all ignore lists by clicking on “Clear all ignore lists” button.

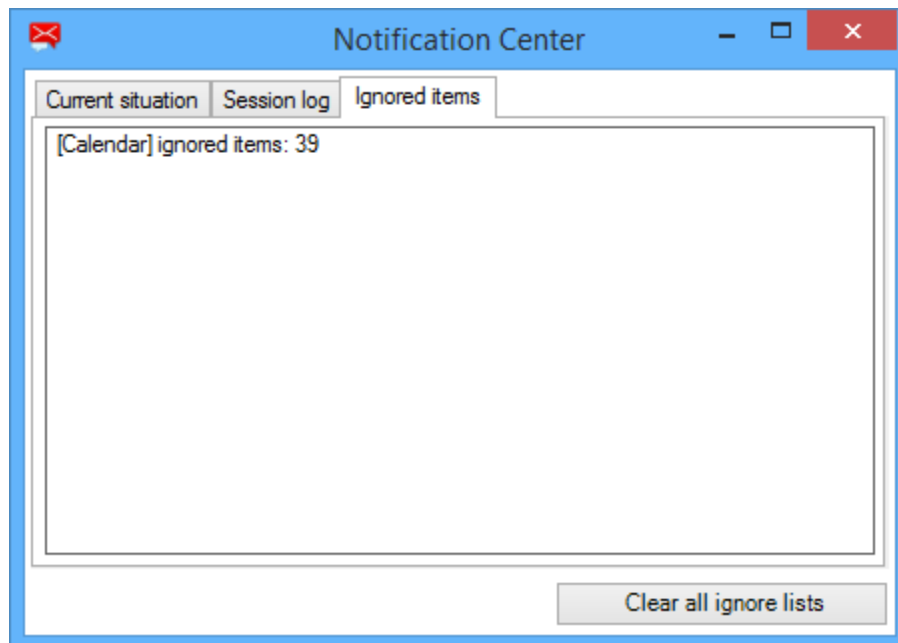


Figure 61 – Notification Center, ignored items tab

For more details about ignore lists refer to the chapter Ignore list.

## AUTOMATIC UPDATES

Outlook Sync offers a mechanism of automatic updates. You can automatically update your Outlook Sync if it has been installed for a particular user (Current user installation), or if you are user with administration privileges on your Windows computer.

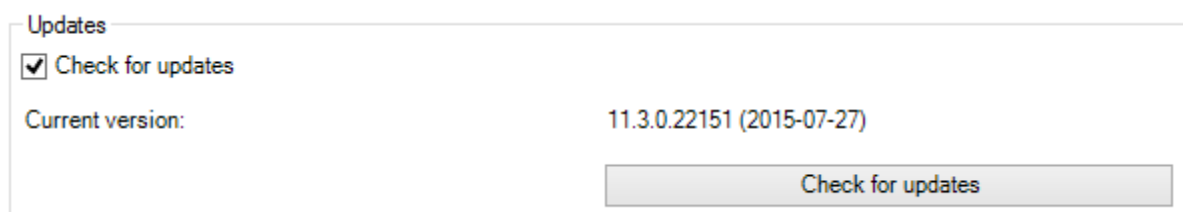


Figure 62 – Automatic updates settings

In the **Settings ~ License and updates ~ Updates** you can manually trigger “Check for updates” or disable automatic checking for updates at the start of the Outlook Sync by ticking or unticking checkbox “Check for updates”. If you do not see this tab, you have installation for entire machine and you are not an administrator.

## VIEW OF THE ADMINISTRATOR

Version offered to Outlook Sync users is the file outlook-sync.exe in the “install” folder within IceWarp server installation folder.

*Windows: C:\Program Files (x86)\IceWarp\Install\outlook-sync.exe; you need to restart control service if you replace this file with newer version.*

## VIEW OF THE OUTLOOK SYNC USER

If you have automatic checking for updates enabled, and if server is offering newer version, Outlook Sync displays a small notification about it (see Figure 63 – Offer of a new version). This notification balloon disappears after couple of seconds, but a tray icon remains, you can always click on it to open download dialog (see **Error! Reference source not found.**).

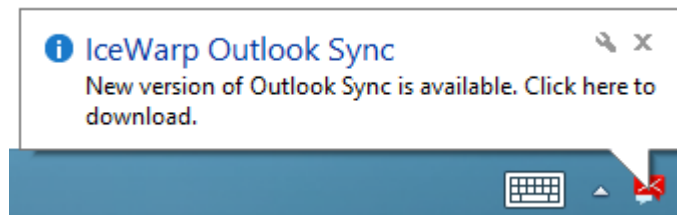


Figure 63 – Offer of a new version

New update dialog allows you to decide what to do with the update.

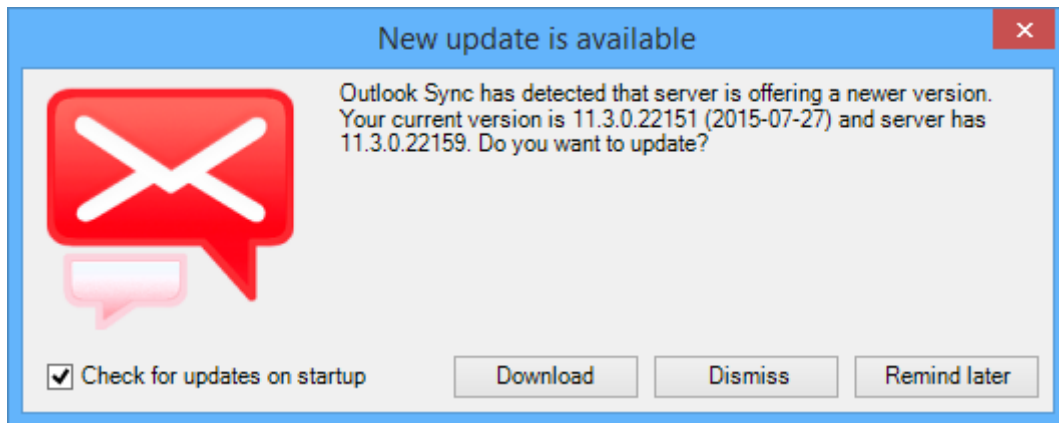


Figure 64 – New update is available dialog

- Check for updates on startup – untick this box if you do not want to let Outlook Sync check for new version on startup.
- Download – initiate download of the update on the background.
- Dismiss – this particular version will be skipped, this can be overridden by clicking on “Check for updates” in the settings dialog, see Figure 62.
- Remind later – after a while, defined as four hours, you will be notified again.

As soon as update is downloaded, a new dialog appears.

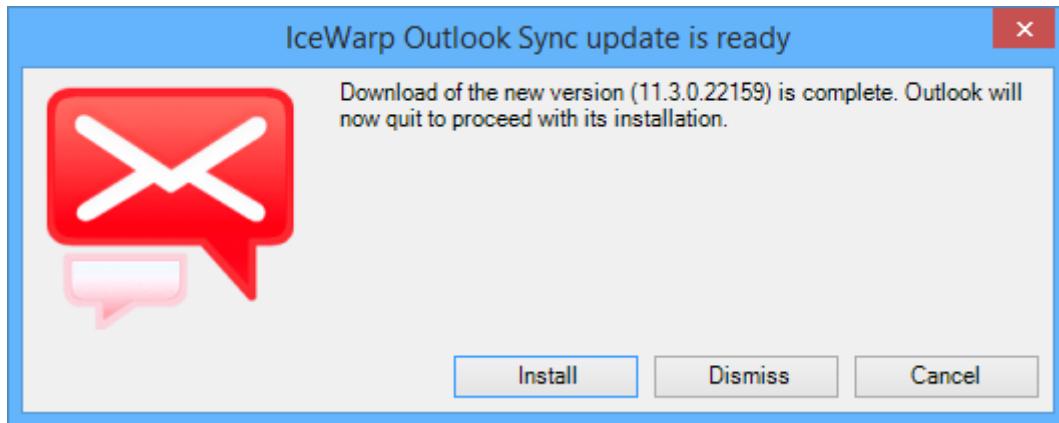


Figure 65 – Installation offer dialog

- Install – start installation of new update, this will terminate Outlook, save your work.
- Dismiss – skips installation of new update
- Cancel – decide later, you are able to reinitiate this dialog by clicking on tray icon.

*Please note that you cannot perform automatic update process if you have installed Outlook Sync for all users on your machine, thus requiring administrator privileges, and you are not an administrator.*



## MANAGING CONNECTION CERTIFICATES

If you are connecting to your server through a secured connection, either by STARTTLS or with direct SSL, you may encounter problems with the connection certificate. Each certificate needs a 3<sup>rd</sup> party subject for its validity verification; such subjects are commonly called Certificate Authorities (CA). You may know some of them like Comodo, Thawte or VeriSign and many others. If server certificate is signed by a verified CA you have no problem with the connection, on the other hand if a server certificate is signed by unverified CA, usually so called self-signed certificate, you need to deal with an untrusted connection.

Following paragraphs briefly describes how to remedy this issue.

*If you are unsure about offered certificate, contact your administrator for further information.*

### TRUSTED CONNECTION

If your server has a certificate that is signed by certificate authority, and if this certificate is valid, connection goes smoothly without any warning.

### UNTRUSTED CONNECTION

If your server's certificate cannot be verified, you need to decide whether you trust the certificate or not.

Connection Security Warning dialog is displayed when certificate offered by the server could not be verified. If you are unsure whether to trust the certificate or not, press "Cancel" button; connection will be immediately terminated and Outlook Sync will not be able to connect to your server.



Figure 66 – Connection Security Warning dialog

If you click on "View certificate" a Windows dialog with certificate details is displayed. Do not click on button "Install certificate" on this dialog; instead use "Trust" button in Outlook Sync dialog.

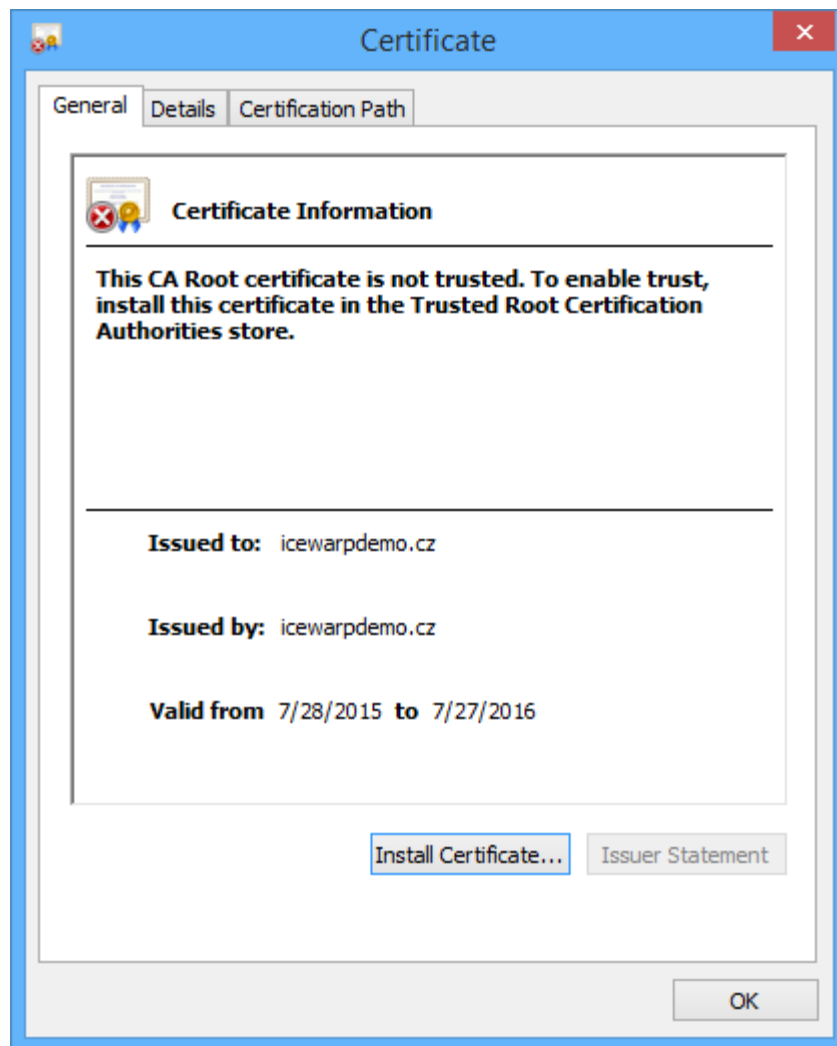


Figure 67 – Microsoft Windows Certificate window

If you decided that you trust the certificate, tick the checkbox “I understand the risk and I want to authorize this certificate”, this enables button “Trust”. Then click on the button “Trust”. A Windows dialog with a question “Do you want to install this certificate” appears, click on “Yes”.

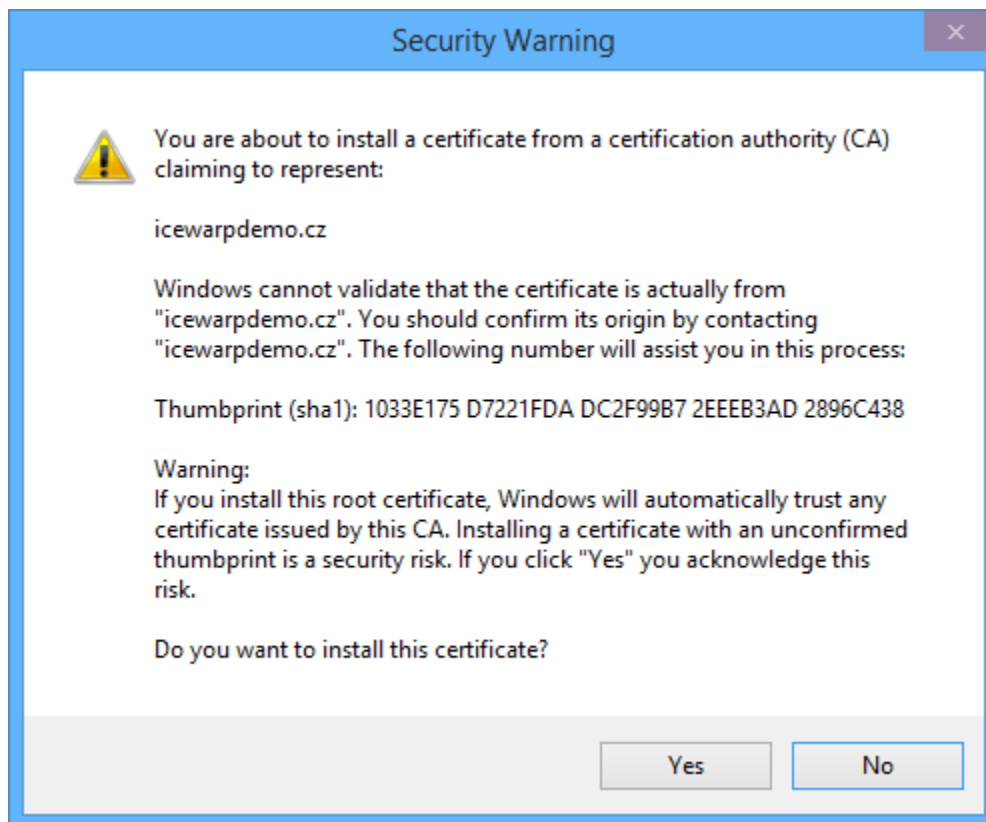


Figure 68 – Microsoft Windows Certificate Trust dialog

## REMOVING CERTIFICATE

If you decide that you no longer want to use certificate trusted by Outlook Sync, you may go to the Outlook Sync settings and in **Login Credentials tab ~ Incoming Server Credentials** click on button "Manage certificates". Select certificate you want to remove and click on button "Remove".

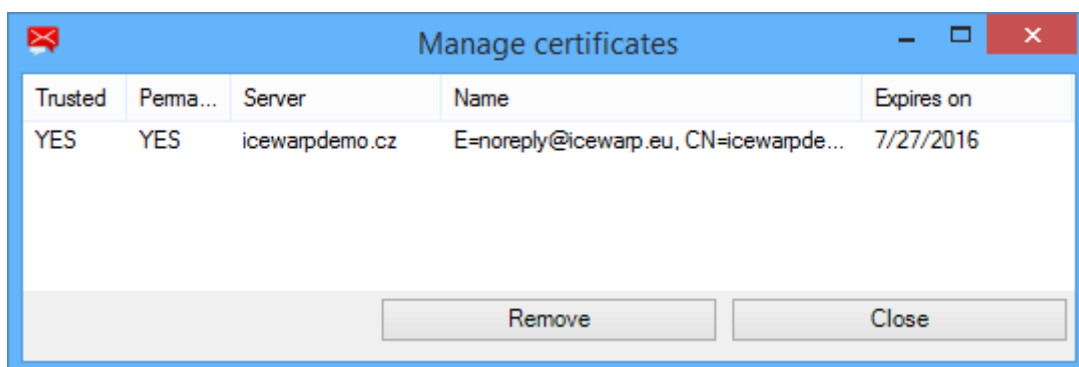


Figure 69 – Outlook Sync certificate manager

After you remove trusted certificate from Outlook Sync storage, it also deletes it from Windows certificate store and certificate will no longer be trusted.

## PROFILE MANAGER

Profile manager is an independent part of Outlook Sync installer allowing you to create new Outlook Sync profiles. It is very similar to the installation with a very few differences. You can start Profile manager either from Outlook by clicking on icon called “New profile”, or by double clicking on link “Profile Manager.lnk” created in the start menu on Windows 7 and older, or as a tile on Windows 8 and later.

Because of its similarity with the installation procedure, for additional details see chapter “Installation step by step”, following paragraphs contains only a brief explanation.

### STARTING PROFILE MANAGER FROM OUTLOOK

If you click on the icon “New profile”, Outlook Sync asks you if you want to exit Outlook. Profile manager cannot run if Outlook is still running. If you click on “No”, operation is aborted and you can continue in work; if you click on “Yes”, Outlook will be terminated, keep in mind to save your work.

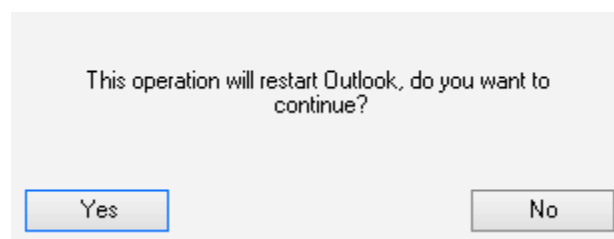


Figure 70 – Restart Outlook dialog

### STARTING PROFILE MANAGER VIA LINK

If you start Profile manager via link outside the MS Outlook, it may happen that your Outlook is still running. In that case, profile manager reminds you about that and lets you chance to exit Outlook and continue with creating a profile.

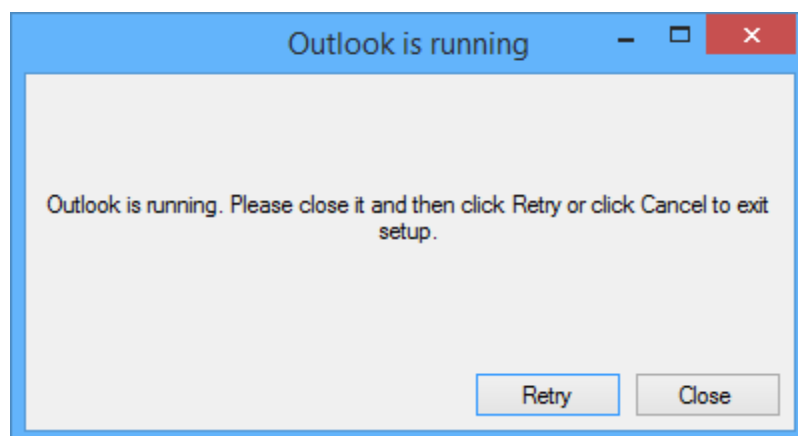


Figure 71 – Warning Microsoft Outlook is running

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**STEP 1 – PROFILE MANAGER WELCOME PAGE**

When you start Profile Manager it greets you with a welcome page, click on “Next” to begin creating a new profile.

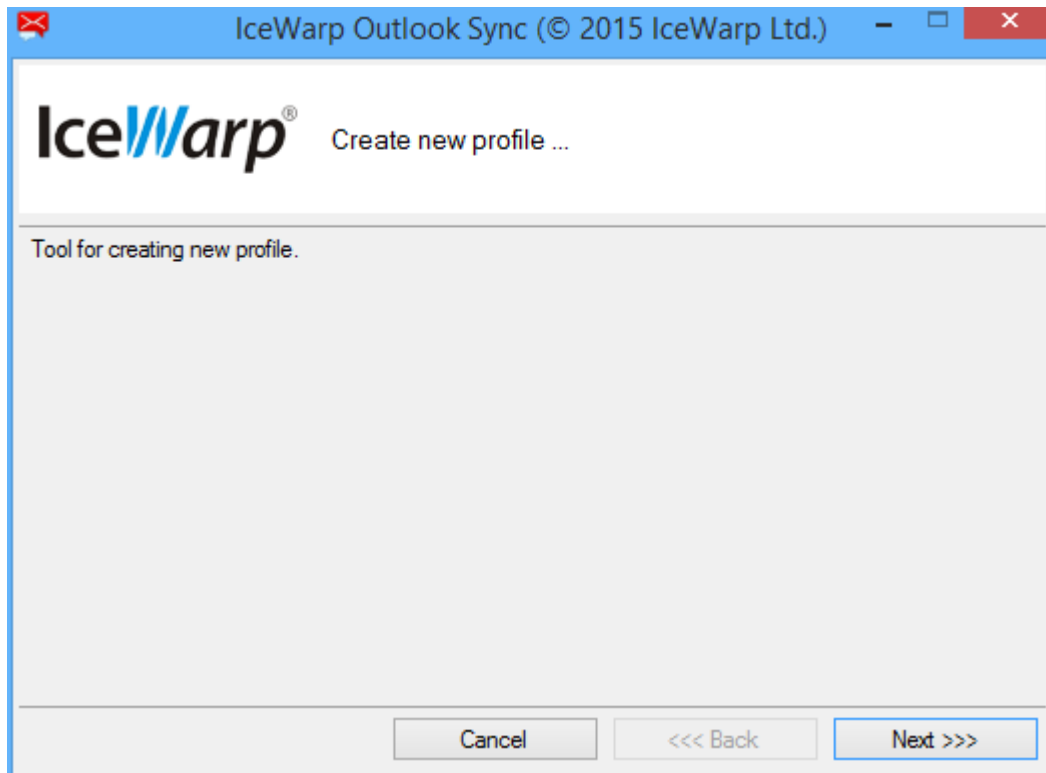


Figure 72 – Welcome (Profile Manager page)

## STEP 2 – SMARTDISCOVER

In the first step you need to fill in your configuration properties for SmartDiscover.

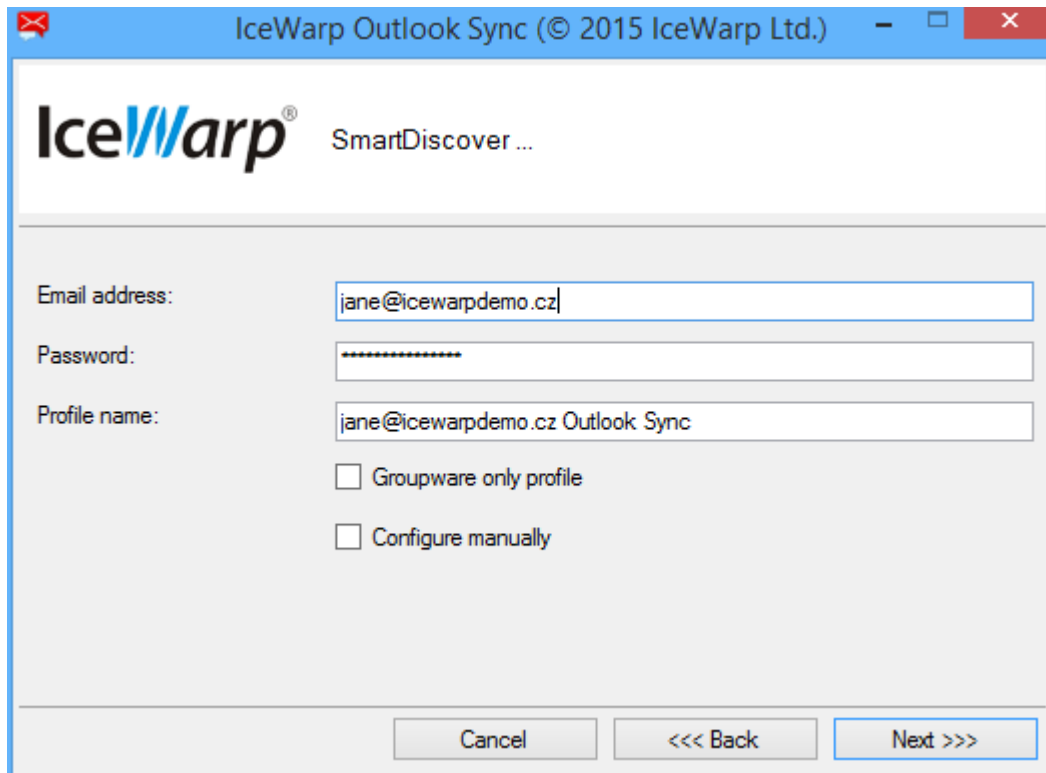
The screenshot shows a Windows-style window titled "IceWarp Outlook Sync (© 2015 IceWarp Ltd.)". Inside the window, the "IceWarp" logo is on the left and "SmartDiscover ..." is on the right. Below this, there are three text input fields: "Email address:" containing "jane@icewarpdemo.cz", "Password:" with masked characters, and "Profile name:" containing "jane@icewarpdemo.cz Outlook Sync". Under these fields are two unchecked checkboxes: "Groupware only profile" and "Configure manually". At the bottom of the window are three buttons: "Cancel", "<<< Back", and "Next >>>".

Figure 73 – SmartDiscover (Profile Manager page)

- Email address and password are login credentials you were supplied with by your administrator, if you do not know them, do not hesitate to contact your administrator.
- Profile name – it is the name of Outlook profile that will be handled by Outlook Sync
- Groupware only profile – determines if the profile will be regular or “Groupware only”, for details see chapter “What is Outlook Sync profile”.
- Configure manually – skips SmartDiscover and installer will not contact server for configuration details. It means that you are on your own there.

*If you do not know all configuration properties and Smart Discover had failed, contact your administrator.*

### STEP 3 – PROFILE PROPERTIES

You will see this page only if SmartDiscover was not able to retrieve information from the server or if you have selected manual configuration. Why SmartDiscover might be failing see chapter “SmartDiscover is not working”.

If SmartDiscover was working properly, you can go directly to “Step 5 – Progress window” and skip following paragraphs.

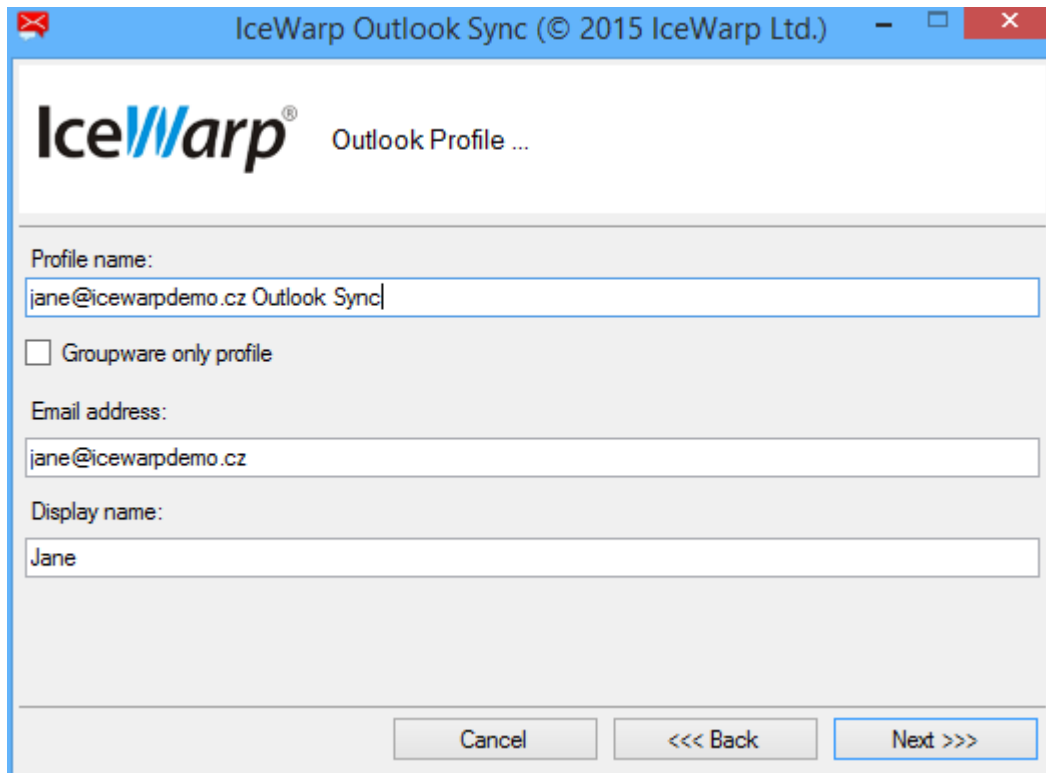
The screenshot shows a Windows-style window titled "IceWarp Outlook Sync (© 2015 IceWarp Ltd.)". Inside the window, the IceWarp logo is on the left and "Outlook Profile ..." is on the right. Below this, there are three text input fields: "Profile name:" containing "jane@icewarpdemo.cz Outlook Sync", "Email address:" containing "jane@icewarpdemo.cz", and "Display name:" containing "Jane". There is also a checkbox labeled "Groupware only profile" which is currently unchecked. At the bottom of the window, there are three buttons: "Cancel", "<<< Back", and "Next >>>".

Figure 74 – Profile properties ((Profile Manager page)

- Profile name is the name of Outlook profile, previous value from SmartDiscover tab is preserved.
- Email address is your email address that will be associated to your new profile.
- Display name is your name and surname that is used for configuring Outlook mail properties.

For additional description you may see chapter “Step 7 – Profile properties”.

## STEP 4 – CONFIGURATION

## INCOMING SERVER PROPERTIES

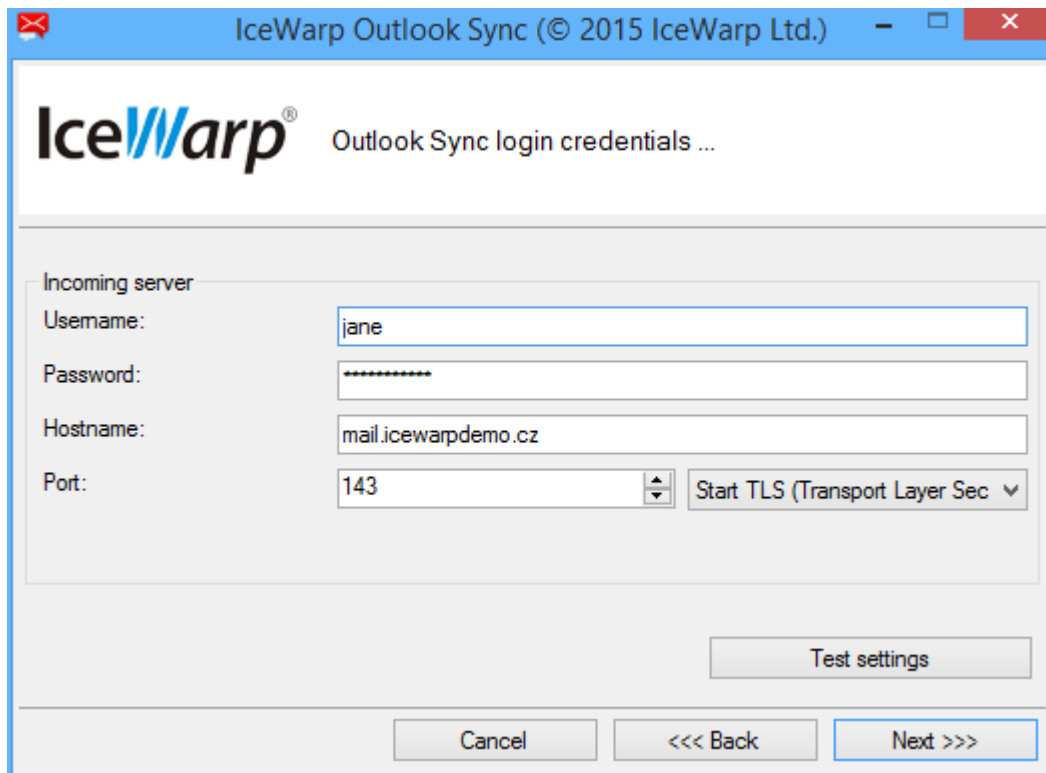


Figure 75 – Incoming server properties (Profile Manager page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) ‘s username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Password is your secret key to access your account.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 143.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

For additional description you may consult chapter “Step 8 – Incoming server configuration”.



## OUTGOING SERVER PROPERTIES

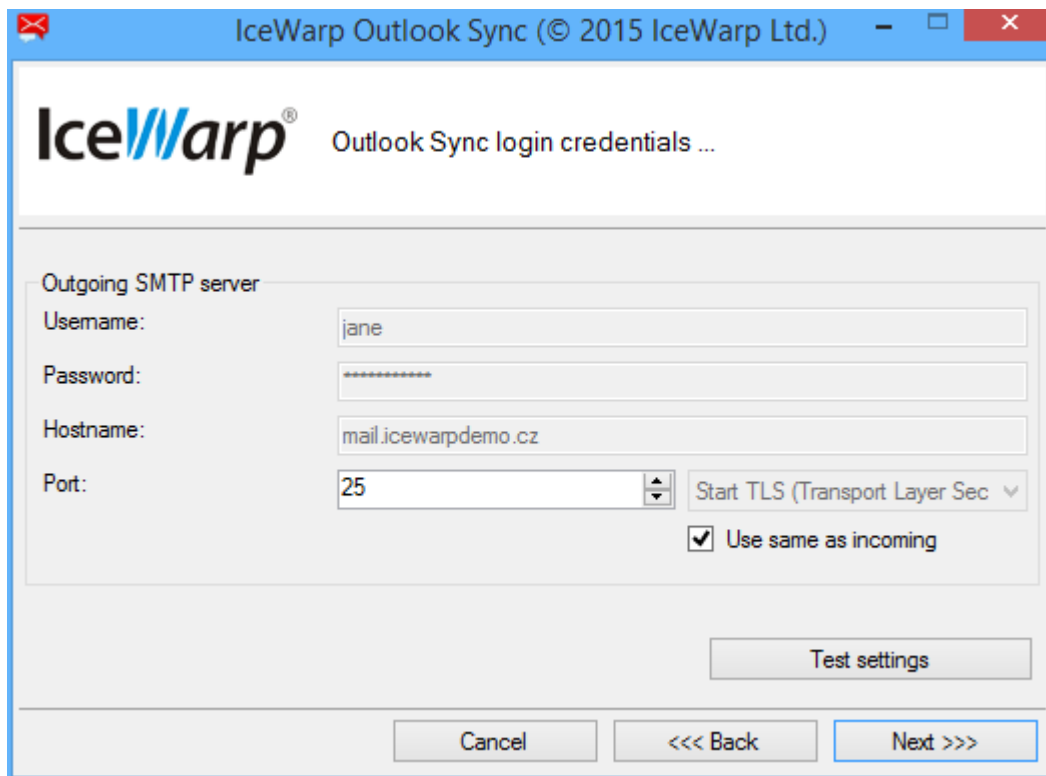


Figure 76 – Outgoing server properties (Profile Manager page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) ‘s username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Password is your secret key to access your account.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 25.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

For additional description you may consult chapter “Step 9 – Outgoing server configuration”.

## INCOMING POP3 SERVER PROPERTIES

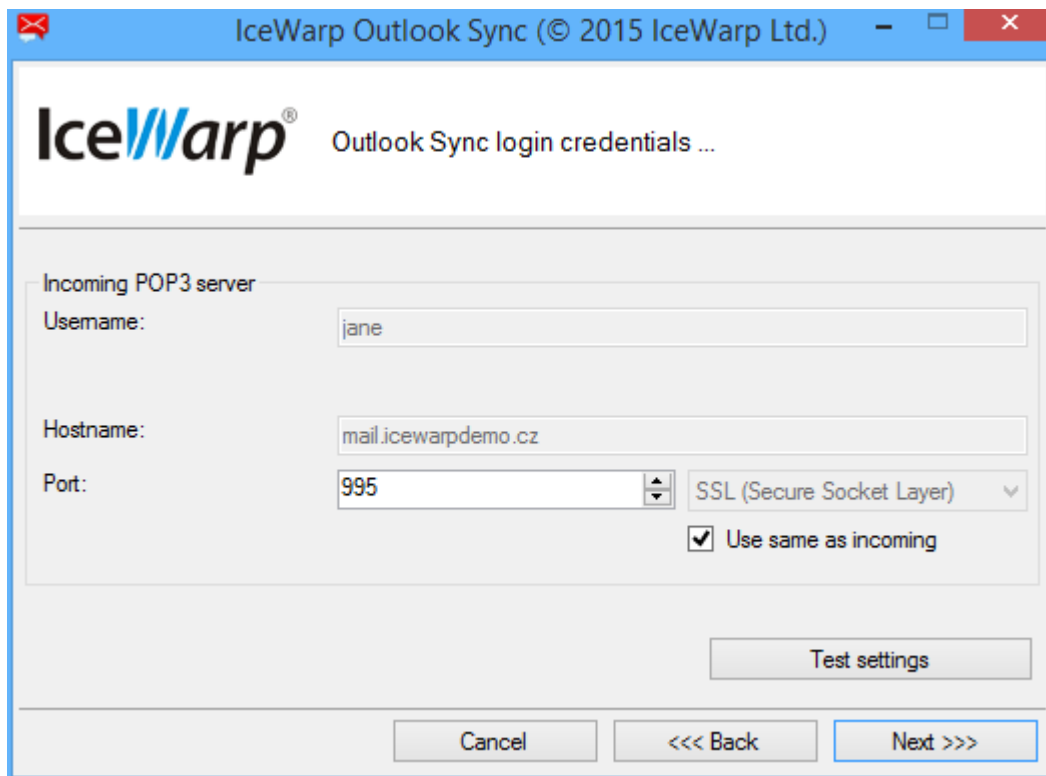


Figure 77 – Incoming POP3 server properties (Profile Manager page)

- Username is your login; usually it is the “part” before @, e.g. [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) ‘s username could be “francis”. But if your server is configured to login with email address then use [francis@icewarpdemo.com](mailto:francis@icewarpdemo.com) as your username. If in doubt consult this situation with your administrator.
- Hostname is the address of your server; it can be a hostname or IP address.
- Port is the IMAP TCP port configured on your server. Default value is 110 for plain, or 995 for secured line.
- Line security defines whether all communication between Outlook Sync and IceWarp server will be encrypted or unencrypted (plain). Unsecured line does not encrypt any data, generally this option is not recommended.

For additional description you may consult chapter “Step 10 – Incoming POP3 server configuration for groupware only profile”.

---

**STEP 5 – PROGRESS WINDOW**

After the configuration is either gathered from SmartDiscover method or from you manually, Profile Manager prepares configuration file for Microsoft Outlook.

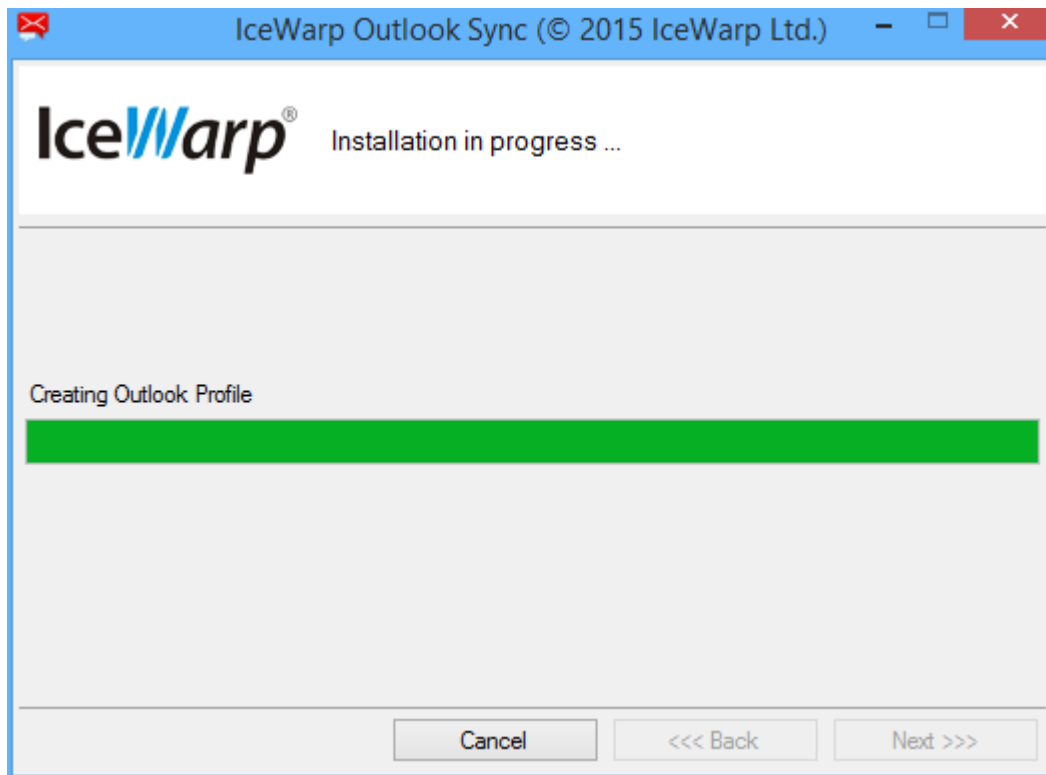


Figure 78 – Profile manager progress (Profile Manager page)

---

**STEP 6 – NEW PROFILE SUMMARY**

When Profile manager has reached this page, every required part for new profile is prepared and profile manager is ready to start Outlook. After you click on “Finish”, Outlook will be started with the configuration file in the argument and creates new profile.

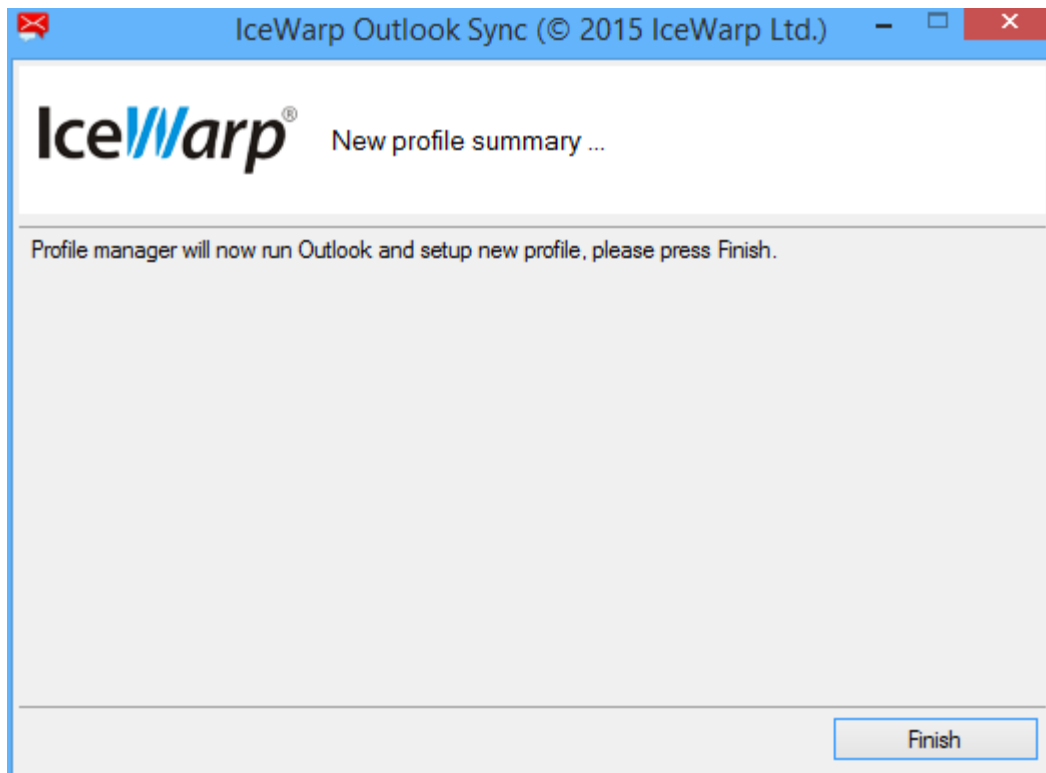


Figure 79 – Profile summary (Profile Manager page)

## LICENSE

If your server is properly configured and your license is active and valid, you do not need to perform any additional action regarding the license. Everything is being done automatically, from the initial license activation during the installation, to the reactivation if your license is going to expire soon. But in some cases, you would need to do the activation on your own.

## ONLINE ACTIVATION

### STEP 1 – ACTIVATION KEY

To activate license you need to have an activation key. One possible way is to obtain your activation key from your administrator. Another way is to get it via IceWarp WebClient: Within the **Communication Bar – Options** dialog, select the **Licenses** tab – *Outlook Sync* item. From the *Product Activation Key* field, copy your activation key.

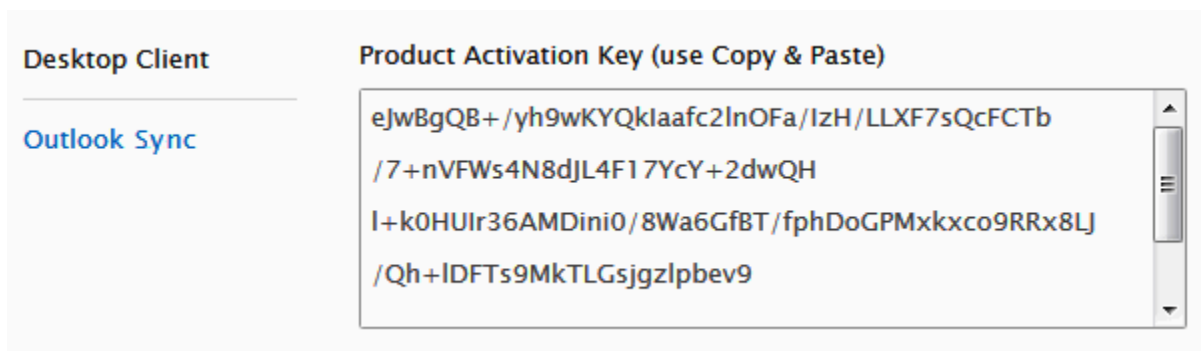


Figure 80 – Product activation key

### STEP 2 – ACTIVATION TAB

Within the **MS Outlook – IceWarp Sync** tab – **License** dialog, select the **Online Activation** tab. Paste your activation key into the *Activation Key* field. Click the **Activate License** button. The button will only be active if you enter a correctly formatted activation key. Click **OK** to finish activation.

License Online Activation Enter License Offline

1. Acquire your activation key from WebClient by going to [Options - Licenses] or contact your server administrator.

2. In order to obtain the license, enter the activation key into the below field and press "Activate License."

Activation Key:

+k0HUIr36AMDini0/8w/a6GfBT/fphD oGPMxkxco9RRx8LJ/Qh  
+IDFTs9MkTLGsigzlpbev9awF+7tjDQCoawF+7tjDQCo=

Identification Key: C48E7806-5219F4A4-92A7FECF-867939F6-MW

Activate License

OK

Figure 81 – Online activation

## LICENSE TROUBLESHOOTING

An error message is shown in the case the activation failed.

License registration may fail for the following reasons:

- The activation key is expired – obtain a new one and repeat the registration.
- The computer is blocked from accessing the Internet or access to the licensing server is temporarily unavailable.
- The number of client licenses has been exceeded for your organization. IceWarp licensing servers track how many systems have been activated using a given license. If the number of activated clients exceeds the total for the license, IceWarp Outlook Sync will inform you that additional licenses need to be purchased.
- If you need to reinstall IceWarp Outlook Sync software on a new system due to either hardware failure or system upgrade, contact your support staff to assist you with removing the existing IceWarp Outlook Sync registration or request a new activation key.

## OFFLINE ACTIVATION

To activate your license offline, follow these steps.

### STEP 1 – REGISTERING AND GETTING LICENSE.XML

1. To register IceWarp Outlook Sync off-line (because your computer cannot access the license server), you need to obtain the **license.xml** file from IceWarp website.
2. Go to <http://www.icewarp.com/purchase/>, click the **License Maintenance** button and in the **Client License Activation** section, click the **Activate License** button.
3. Copy the content of the **Identification Key** field (License dialog – Online Activation tab (see the above figure)) and paste it into the web page field of the same name.

Copy your activation key and paste it into the **Activation Key** web page field.

Click the **Next** button.

4. On the next page, click the link to download your **license.xml** file and save it into the wished directory.

---

## STEP 2 – ENTERING LICENSE OFFLINE

In the IceWarp Outlook Sync **License** dialog – **Enter License Offline** tab, click the **Enter License File** button.

Browse for the **license.xml** file and click **Open**.

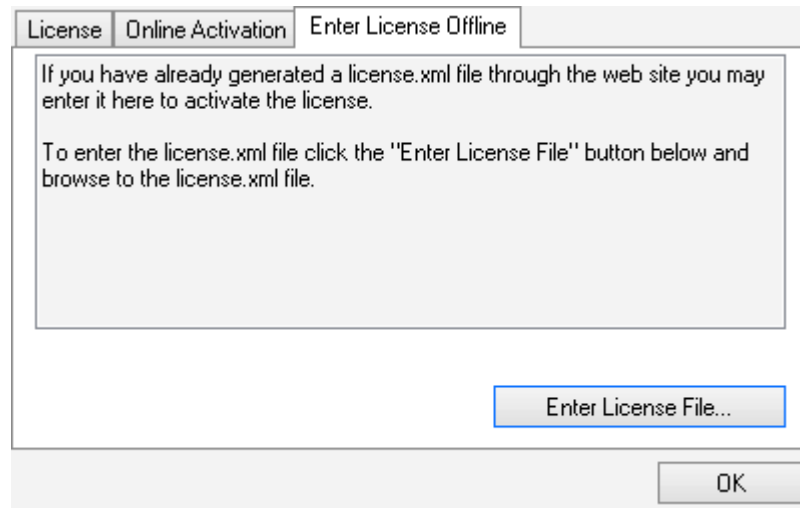


Figure 82 – Offline license

Click **OK** to finish activation.

*If you are unable to register the IceWarp Outlook Sync, contact your support helpdesk or IT administrator, please.*

## UNINSTALLATION

If you need to uninstall IceWarp Outlook Sync, you may either search for it in “Program and Features” in Windows, or you may run IceWarp Outlook Sync’s installer.

It will detect IceWarp Outlook Sync is installed and offers you to repair or uninstall product.

### STEP 1 – SELECTING MODE (UNINSTALL)

On the **Installation and maintenance** screen, select the **Uninstall** option and click the **Next** button.

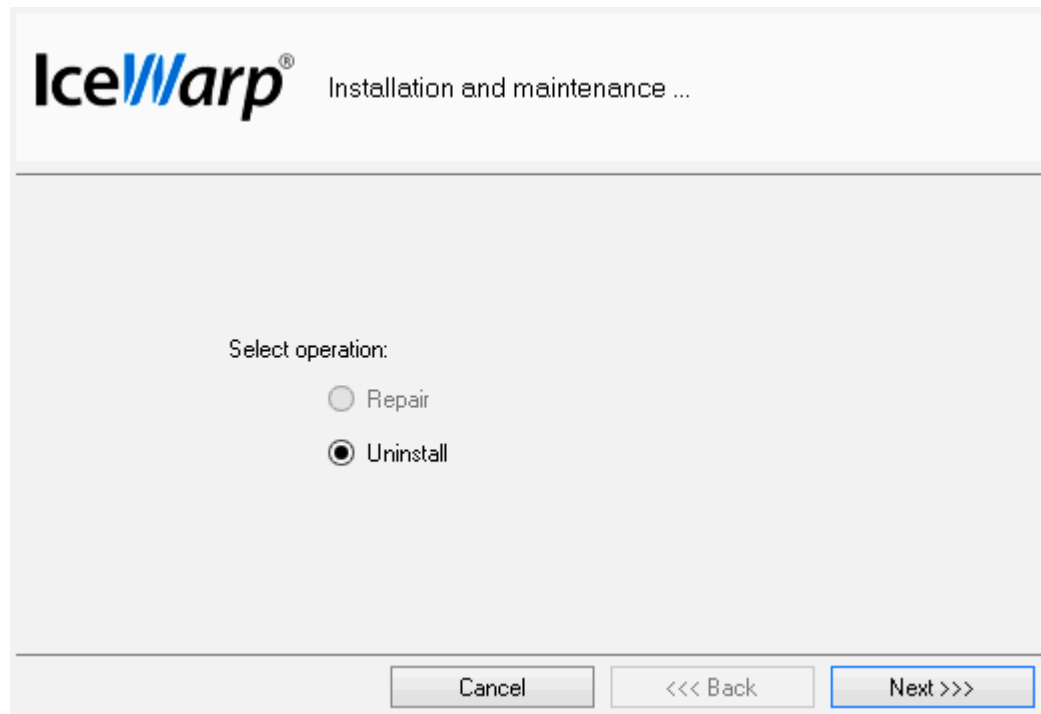


Figure 83 – Uninstall page



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**STEP 2 – FINISH**

On the **Uninstall summary** screen, review an uninstallation message and click the **Finish** button to close the wizard.

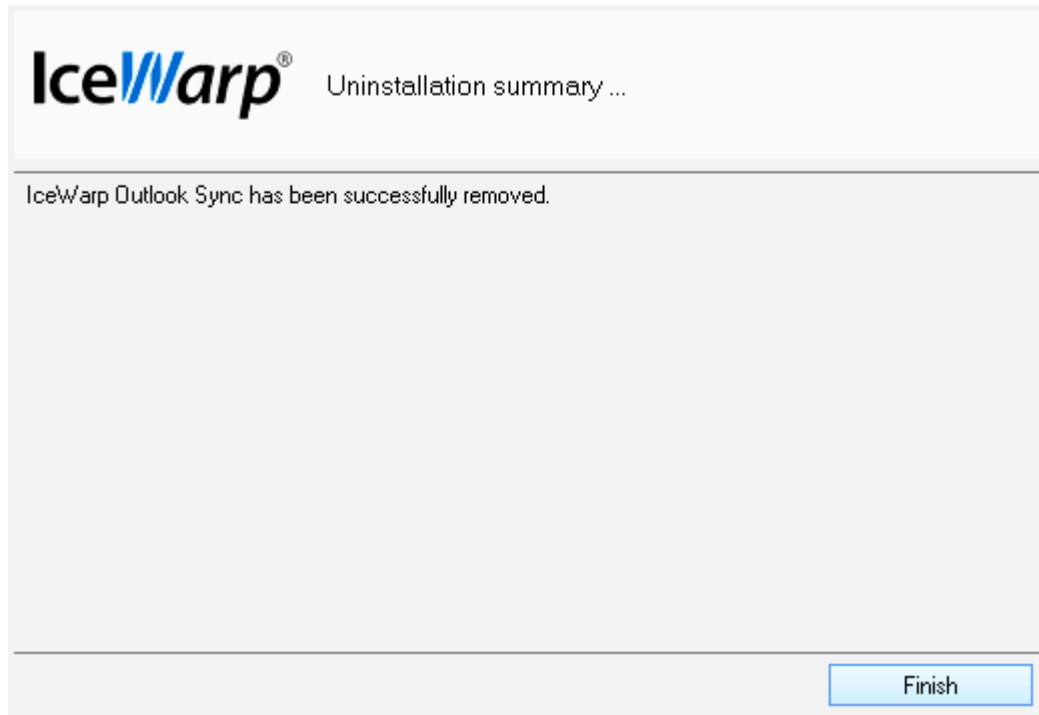


Figure 84 – Uninstall summary

## TROUBLESHOOTING

*If you find your Outlook Sync in trouble that you cannot resolve, please contact your administrator; we will assist him in resolving your problem as soon as possible.*

### OUTLOOK CANNOT SEND ANYTHING OUT

Verify that Outlook is not blocked by a firewall or by antivirus scanning port 25 or alternatively secured port 465.

### I CANNOT RECEIVE ITEMS FROM THE SERVER

Verify that Outlook Sync is not blocked by a firewall on port 143 or alternatively on secured port 993. Extensive scans on IMAP protocols, like proxy or antivirus, might not understand IceWarp IMAP extension and may block this protocol.

### OUTLOOK SYNC AND ANTIVIRUS

In some cases, folder synchronization can last minutes. This is caused by an antivirus that checks incoming messages. During this time IceWarp Outlook Sync waits for an IMAP server response. If the situation occurs (it is not too often), you will see a message similar to this one:

To resolve this problem, disable email checking in your desktop antivirus program. As your IceWarp Server provides this service too, you need not to be afraid of doing this.

You may want to have your outgoing messages checked by your antivirus program because it attaches a short message to them to ensure recipients that messages are safe.

It is possible as outgoing messages check does not cause synchronization delays. You can disable only incoming messages check, provided that your antivirus program supports it.

### I CANNOT RECEIVE EVENTS WITH ATTACHMENTS FROM THE SERVER

If you see that events with attachments in your calendar cannot be synchronized from your WebClient to the Outlook Sync, the most likely cause is failing WebDAV. Outlook Sync is using WebDAV protocol for downloading attachments separately.

*If in doubt contact your administrator to verify WebDAV link settings in SmartDiscover server settings.*

### OUTLOOK IS TRYING TO SEND MESSAGE BUT OUTBOX IS EMPTY

Outlook shows number of messages while sending, but none of them are in the Outbox folder. Messages cannot be sent and progress bar is stuck. Probably cause is that Outlook received a message requesting read receipt in TNEF format and generated a reply with the same format. While TNEF is disabled by Outlook Sync, reply message remains stuck in the Outbox, until deleted by the PST editor or TNEF is enabled again.

1. Go to the Sync Settings ~ Advanced and uncheck "Disable TNEF"
2. Go to the Outlook Tools ~ Options ~ Email options ~ Tracking options and set "Never send a response" in the last paragraph about read receipts handling
3. Go to the Sync settings ~ appearance and enable "Handle read receipts", where set handling of your preference (Send, never send or ask)
4. Restart Outlook
5. Click on "Send/Receive" button, because of an action "1", all stuck read receipts will be send
6. Go again to the Sync Settings ~ Advanced and check "Disable TNEF"

## 7. Restart Outlook

### SMARTDISCOVER IS NOT WORKING

SmartDiscover always tries HTTPS for security reasons. It attempts to contact four types of addresses that are constructed based on your domain, MX record(s) and SRV record. Because there can be more MX records, final list can be longer.

1. <https://autodiscover.icewarpdemo.cz/autodiscover/autodiscover.xml>
2. <https://icewarpdemo.cz/autodiscover/autodiscover.xml>
3. (MX) <https://mail.icewarpdemo.cz/autodiscover/autodiscover.xml>
4. (SRV) <https://autodiscover.icewarpdemo.cz/autodiscover/autodiscover.xml>

*Please note that according to the specification SRV record must point to the secured port, if the port is specified.*

### WINDOWS VISTA INSTALLATION ISSUE

You can obtain the **Insufficient Rights** error message when installing IceWarp Outlook Sync under Windows Vista. If you want to install Outlook Sync for entire machine it is necessary to run installation manually as **Administrator**, because automatic administration elevation is not available.

## ADVANCED NOTES

### WHAT IS RUNNING ON PORT 5110 AND WHY

IceWarp Outlook Sync is based on a classical POP3/SMTP account. The SMTP account is set to use an existing IceWarp Server, whilst the POP3 account is set to be inactive. Therefore IceWarp Outlook Sync does not deal with sending emails at all.

However, Outlook itself wants to operate its POP3 account, on the other hand, Outlook Sync must prevent it from doing so.

For this reason, Outlook Sync is running its own simple POP3 server, bound to 127.0.0.1 and by default on port 5110. IceWarp Outlook Sync listens on this port and simulates zero activity here. MS Outlook connects to this port from time to time and asks for new emails. IceWarp Outlook Sync always answers that there are not any new emails.

### USED PROTOCOLS AND PORTS

#### IMAP (INCOMING CONNECTION)

IMAP protocol is used for main communication between the IceWarp server and Outlook Sync. All items are synchronized from the server using a slightly extended IMAP protocol and vice versa. Ports are 143 for plain communication and 993 for secured channel.

#### SMTP (OUTGOING CONNECTION)

SMTP protocol is used by Outlook itself for sending messages. Ports are 25 for plain communication and 465 for secured channel.

#### POP3 (INCOMING CONNECTION)

POP3 protocol is used by Outlook itself for receiving messages, unless you have groupware only profile, you do not need to worry about this protocol. Ports are 110 for plain communication and 995 for secured channel.

#### HTTP (SUPPORTIVE PROTOCOLS)

HTTP is used for license requests and for WebDAV requests while downloading event attachments and for SmartDiscover. Required ports depend on server settings, but generally it is port 80, and 443 for secured ports. Port 5229 is used for license requests.

*Please note that SmartDiscover always uses secured channel on port 443.*

## WEBDAV (ATTACHMENTS RETRIEVAL)

WebDAV is a protocol over HTTP that is used for downloading attachments. Its link is sent by the server depending on the “WebDAV & SmartAttach” setting on the server. It is recommended that this link is set to HTTPS on the server.

The screenshot shows the 'Services' configuration page in the IceWarp web interface. It has two tabs: 'General' and 'SmartDiscover'. The 'General' tab is active. At the top, there is a 'Public Hostname' field with the value 'icewarpdemo.cz'. Below this is a 'Services' section with a table of protocols and their configurations. The protocols listed are SMTP, POP3, IMAP, XMPP, and SIP, all with the hostname 'icewarpdemo.cz'. To the right of each hostname is a dropdown menu for security settings: TLS/SSL for SMTP, and Standard for POP3, IMAP, XMPP, and SIP. Below the 'Services' section is a 'URL' section with four text input fields: 'MobileSync (ActiveSync)' with 'https://icewarpdemo.cz/Microsoft-Server-ActiveSync', 'SyncML (OMA DS)' with 'http://icewarpdemo.cz/syncml/', 'WebDAV & SmartAttach' with 'https://icewarpdemo.cz/webdav/', and 'WebClient' with 'http://icewarpdemo.cz/webmail/'.

Services		
Public Hostname:	icewarpdemo.cz	
Services		
SMTP:	icewarpdemo.cz	TLS/SSL ▼
POP3:	icewarpdemo.cz	Standard ▼
IMAP:	icewarpdemo.cz	Standard ▼
XMPP:	icewarpdemo.cz	Standard ▼
SIP:	icewarpdemo.cz	Standard ▼
URL		
MobileSync (ActiveSync):	https://icewarpdemo.cz/Microsoft-Server-ActiveSync	
SyncML (OMA DS):	http://icewarpdemo.cz/syncml/	
WebDAV & SmartAttach:	https://icewarpdemo.cz/webdav/	
WebClient:	http://icewarpdemo.cz/webmail/	

Figure 85 – IceWarp server WebDAV setting

## PRIORITIZED QUEUE

Outlook Sync utilizes unique mechanism of downloading items; apart from other clients it requests only parts of messages and builds them together. This approach allows having a specialized priority queue that favorites lastly touched messages. You will get smaller messages and messages you clicked on last sooner than the others and you are not blocked by downloading a large message. Scheme of such queue is on Figure 86 – Prioritized queue.

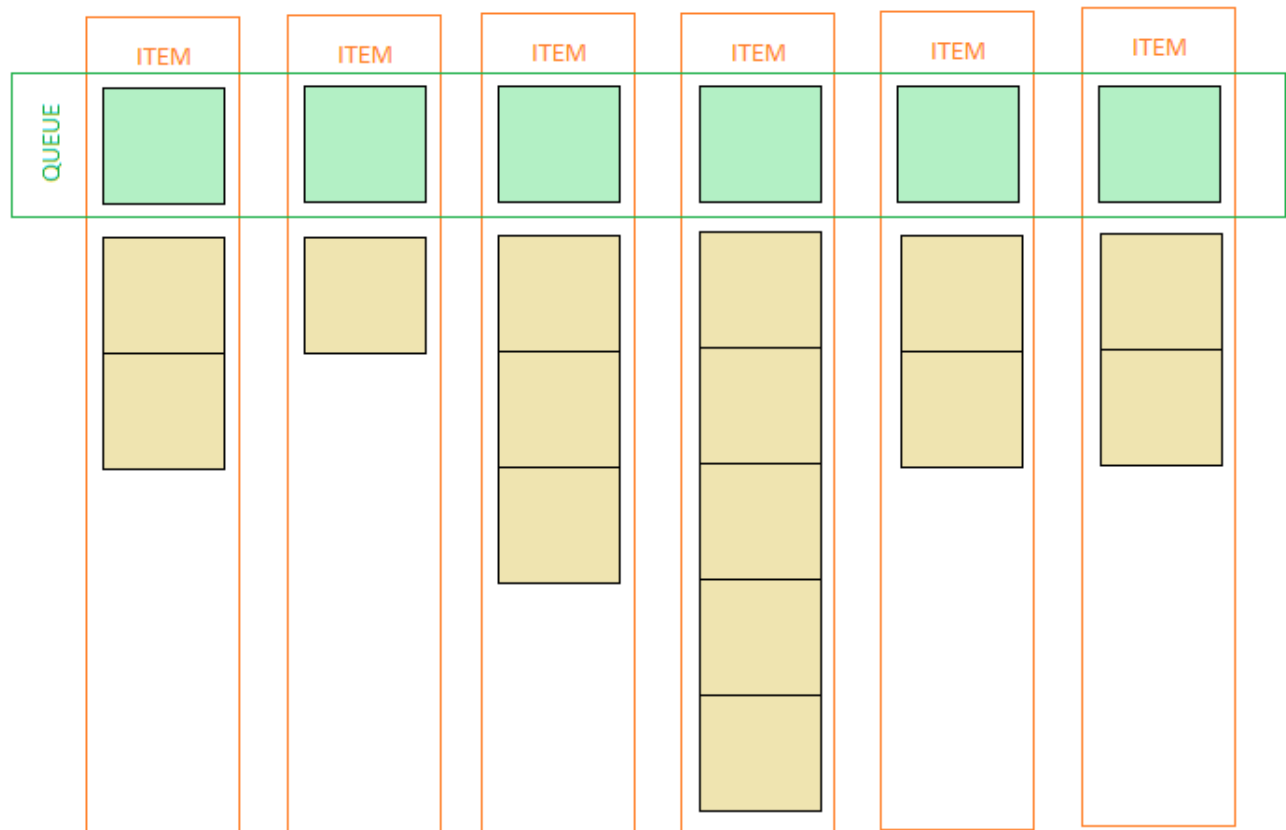


Figure 86 – Prioritized queue

## ADDING A POP3 ACCOUNT TO OUTLOOK PROFILE

You may face the situation when you are using a non-POP3 account and you want to bind it with IceWarp Outlook Sync profile without a groupware data loss. This is also possible:

### STEP 1 – ADD NEW POP3 ACCOUNT

Within the existing profile (that includes your non-POP3 account), create a new "dummy" POP3 account and set it as a default one for this profile – select this account and click the **Set as Default** button.

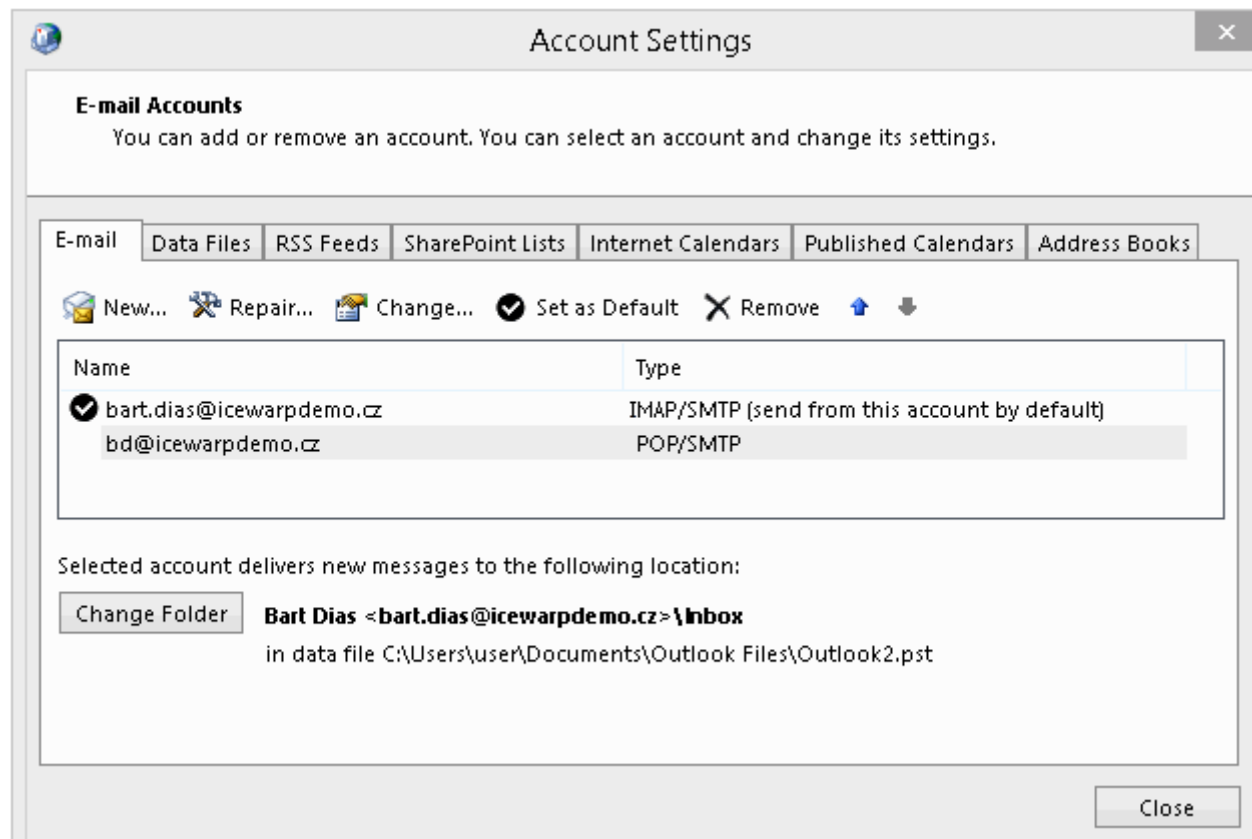


Figure 87 – Microsoft Outlook configuration

## MS OUTLOOK 2007

IMAP account emails are stored on your server – no need to synchronize them. For groupware items (Contacts, Events, etc.), both accounts will use the same local Personal Folders. Later binding will synchronize them all to the server. Just click **No** when the **Initial Synchronization** dialog is shown (see step 3 of the **Bind Profile** chapter).

## MS OUTLOOK 2010

When creating this dummy POP3 account, select the **Existing Outlook Data File** option, click the **Browse** button and select the appropriate **pst** file ([profile\_name].pst). Groupware items (Contacts, Events, etc.) of both accounts are in this file and will be synchronized to the server. Just click **No** when the **Initial Synchronization** dialog is shown (see step 3 of the **Bind Profile** chapter).

## MS OUTLOOK 2013

Workflow is similar to the one described in the previous paragraph. When creating this dummy POP3 account, select the **Manual setup or additional server types** option and click **Next**, select **POP or IMAP** and click **Next**, and continue with selecting the **Existing Outlook Data File** option as described in the previous paragraph.

**POP and IMAP Account Settings**  
Enter the mail server settings for your account.

**User Information**

Your Name:

Email Address:

**Server Information**

Account Type:

Incoming mail server:

Outgoing mail server (SMTP):

**Logon Information**

User Name:

Password:

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

**Test Account Settings**

We recommend that you test your account to ensure that the entries are correct.

☒ Automatically test account settings when Next is clicked

**Deliver new messages to:**

☐ New Outlook Data File

☒ Existing Outlook Data File

Figure 88 – Microsoft Outlook POP/IMAP account configuration

## STEP 2 – OUTLOOK SYNC BIND PROFILE

You might have Outlook Sync installed without profile, or you might already have created a profile, both is not a problem. Run Outlook and follow chapter “I already have Outlook profile and I want to use it”.

*In doubts how binding works, please contact your administrator for assistance. Keep backup of your data.*



## COMMAND PROMPT RUN

It is also possible to run installation using Command Prompt. Use the **outlook-sync.exe** command with the following parameters:

Parameter	Description
--silent	installer will not show any interface, implies the <b>--noprofile</b> argument
--uninstall	installer uninstalls IceWarp Outlook Sync from the machine, recommended with the <b>--silent</b> argument
--log	installer produces installation logs to a file
Use with care	
--noprofile	installer will not ask for profile details and will not create a new profile
--noprofman	installer will not install a profile manager, use only if you are experiencing troubles with permission granting

*Example: outlook-sync.exe --log*

*Do not use command—prompt for regular installations, they are intended to be used in special cases.*

## MASS INSTALLATIONS

For mass installations you may use distributed MSI; you may use for example GPO. Because Outlook Sync requires its parent application, Microsoft Outlook needs to be installed first on the client machines. Client machines must have at least one account with administrator privileges and MSI target must be able to invoke delegation.

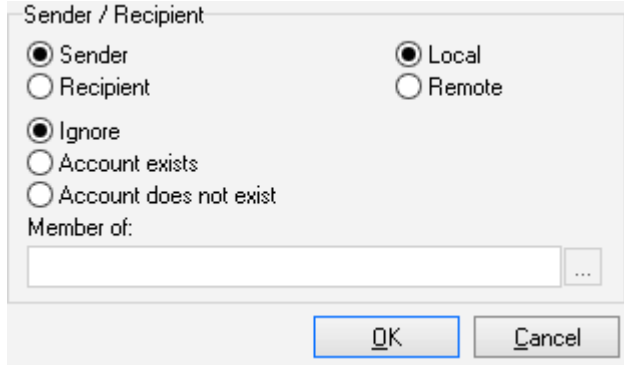
Outlook Sync MSI cannot be installed under the system account because that account does not have Microsoft Outlook available.

## APPENDICES

## APPENDIX A – CONDITIONS

Following table contains description of all available conditions.

Condition	Description
<b>Where From: message header matches some words</b>	Checks the <b>From:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where To: message header matches some words</b>	Checks the <b>To:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Subject: message header matches some words</b>	Checks the <b>Subject:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Cc: message header matches some words</b>	Checks the <b>Cc:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Reply-To: message header matches some words</b>	Checks the <b>Reply-To:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Date: message header matches some words</b>	Checks the <b>Date:</b> header for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Message priority is value</b>	Checks the priority of a message. In the rule description, click the <b>Normal</b> link to select a priority.
<b>Where Message is spam</b>	Checks if the message has been marked as spam.
<b>Where Message is size</b>	Checks the message size. Click the <b>0 kB</b> link to select the message size criteria. Select <b>Greater</b> or <b>Lower</b> and specify its size (in kB).
<b>Where Message body matches some words</b>	Checks the message body for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Custom message header matches some words</b>	<p>Checks the <b>Custom</b> message header for a string condition.</p> <p>In the rule description, click the <b>some words</b> link to create the string condition (explained below).</p> <p><b>NOTE: This rule has an unusual format for the string condition!</b></p> <p>Format: <b>&lt;header&gt;:&lt;string condition&gt;</b></p> <p>where</p> <p><b>&lt;header&gt;</b> is the name of your custom header</p> <p><b>&lt;string condition&gt;</b> is the string condition to test for.</p> <p>Example: <b>MyHeader:jim;bob;john</b></p> <p>Would check the "MyHeader" header for any of the strings "jim", "bob" or "john".</p>

<b>Where Any message header matches some words</b>	Checks all headers for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Attachment name matches some words</b>	Checks the attachment name for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where message contains attachment</b>	Checks whether the message has an attachment.
<b>Where Sender matches some words</b>	Checks the sender for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where Recipient matches some words</b>	Checks the recipient for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where sender/recipient is local/remote</b>	<p>Checks the location of the sender or recipient. In the rule description click on <b>local/remote</b> to open the following dialog:</p> <p><b>Figure 3 – Sender/Recipient Dialog</b></p>  <p><b>Sender/Recipient</b></p> <p>Select whether you want to check the the sender or recipient address.</p> <p><b>Local / Remote</b></p> <p>Select whether you want whether the chosen address is a local account or a remote one.</p> <p><b>Ignore / Account exists / Account does not exist</b></p> <p>Select whether you want to check whether the account exists, does not exist, or ignore this check.</p> <p><i>Only available for local accounts.</i></p> <p><b>Member of:</b></p> <p>Checks whether the account belongs to a particular domain, group, mailing list, etc. Press the '...' button to open the <b>Select Item</b> dialog.</p> <p><i>Only available for local accounts that you check the existence or non-existence of.</i></p>
<b>Where Sender's IP address matches some words</b>	Checks the remote IP address for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).
<b>Where rDNS (PTR) matches some words</b>	Checks the rDNS (PTR) record for a string condition. In the rule description, click the <b>some words</b> link to create the string condition (explained below).

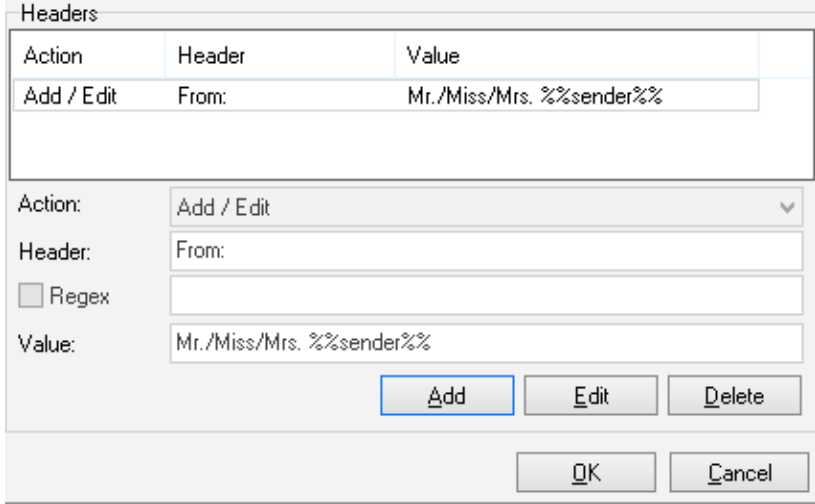
<b>Where Sender's IP address is trusted</b>	Checks whether the Senders IP address is in the trusted list.
<b>Where Spam score is value</b>	In the rule description, click the <b>0.0</b> link to define a greater than or less than value to check the spam score against.
<b>Where SMTP AUTH</b>	Checks whether this message was delivered using an SMTP authorized connection.
<b>Where Local time meets criteria</b>	Checks whether a message meets time criteria defined in the <b>Time Criteria</b> dialog.
<b>All messages</b>	A special condition that evaluates TRUE for all messages – use with care!

## APPENDIX B – ACTIONS

Following table contains description of all available actions.

String Testing	Description
	<p>Clicking the <b>some words</b> link (in a new condition) or the string itself (in a condition already defined) will open the <b>String Condition</b> dialog box.</p> <p>There are four options available in the dialog:</p> <p>The <b>Function</b> drop-down box offers six options for the string test, the option chosen effects the content required in the <b>String</b> text-box</p>
Contains list of strings (semi-colon separated)	Populate the <b>String</b> box with a list of strings to test for. Separate items using semicolons.
Matches (RegEx)	Populate the <b>String</b> box with a regular expression.
Starts with	Looks for the string specified in the <b>String</b> box at the start of the tested condition.
Ends with	Looks for the string specified in the <b>String</b> box at the end of the tested condition.
Equals	Tests whether the tested condition is <b>exactly</b> equal to the string specified in the <b>String</b> box.
Contains a value from a file or pattern	The <b>String</b> box should contain the path to a text file containing a list of strings you wish to test for. Press the "..." button to open a file dialog to navigate to a file where you can specify strings, one per line.
Match case	Check this box to take string case into account.
Match whole word only	Check this box to perform a standard "whole word" check against the string.
Actions	Description
	<p>The following actions are available when a condition is evaluated TRUE.</p> <p>Multiple actions can be selected by checking multiple boxes.</p> <p>Selecting an action will add the action to the <b>Description</b> area. For some actions you can click the text in the description to define the action further. Details follow:</p>
Reject/Accept/Delete/Spam/Quarantine	<p>Adds an action to reject (default) the message.</p> <p>Click the <b>Reject</b> link in the <b>Description</b> area to select <b>Reject, Accept, Delete</b> or mark the message as <b>Spam</b>.</p>

<b>Stop processing more rules</b>	Stops any further rules from being processed, if the rule connected with this action is evaluated as TRUE.
<b>Forward to email address</b>	<p>Forwards the message to an email address.</p> <p>Click the email address link in the <b>Description</b> area to specify the email address.</p> <p><i>You can also send an instant message or an sms using this option:</i></p> <p><i>sms – use sms:&lt;number&gt; e.g. sms:0123456789</i></p> <p><i>IM – use xmpp:&lt;jabberid&gt; e.g. bruce@icewarpdemo.com</i></p>
<b>Move to folder</b>	<p>Moves the message to a folder.</p> <p>Click the <b>folder</b> link in the <b>Description</b> area to select the folder to move to.</p> <p><i>Although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to.</i></p> <p><i>You can have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified IceWarp Server will look for a folder name within the email address and store the message to that folder if it exists.</i></p> <p>Example:</p> <p>A message sent to <b>john:%%Important%%@icewarpdemo.com</b> will be stored in the <b>Important</b> folder.</p> <p><i>Note the colon used to separate the user's alias from the folder name.</i></p>
<b>Copy to folder</b>	<p>Copy the message to a folder.</p> <p>Click the <b>folder</b> link in the <b>Description</b> area to select the folder to copy to.</p> <p><i>NOTE: Although the INBOX folder may be shown in the folder tree, there is little point selecting this folder as this is the default folder that messages will come in to.</i></p>
<b>Encrypt message</b>	<p>Check this option to have the message encrypted.</p> <p><i>NOTE: For this option to work there must be a copy of the user's public certificate located in a file called cert.pem in the user's mailbox folder. The message will be encrypted using this certificate and then can only be decrypted by the user using his private key in his email client.</i></p>
<b>Send message</b>	<p>Sends a message.</p> <p>Click the <b>message</b> link in the <b>Description</b> area to open a dialog to define the message.</p> <p>You can define <b>To</b>, <b>From</b> and <b>Subject</b> fields, the message text (or a file to retrieve the text from), the type of message (text, HTML, or message with an attachment) and whether the message is email, an instant message, or both.</p>

<b>Edit message header</b>	<p>Select this option to add, edit or delete a message header. Click the <b>header</b> link to open the <b>Edit Message Headers</b> dialog.</p> <p><b>Figure 4 – Edit Message Header Dialog</b></p>  <p>Click <b>Add</b> to add a new rule.</p> <p>Select an already defined rule and click <b>Edit</b> or <b>Delete</b> to modify or remove a rule.</p> <p>In the <b>Action</b> drop-down you should select whether this rule will add/edit a header or delete it.</p> <p>In the <b>Header</b> field you should specify the header you want to change/add – remember that the last header name character have to be a colon.</p> <p>You can also add your own named headers e.g. <b>MyHeader:</b></p> <p>The first rule shown in the screenshot above modifies the From header - it adds the string "[URGENT]" to the beginning of the header. Note the use of the IceWarp Server system variable <b>%%from%%</b> here, which is the value of the original From header. Any system variable can be used.</p> <p>The second rule simply deletes the <b>From</b> header.</p>
<b>Set message priority to value</b>	<p>Select this option to have the priority of the message changed. Click the <b>Normal</b> link to select the priority to be assigned.</p>
<b>Set message flags</b>	<p>Select this option to set a message flag. Click the <b>flags</b> to set the flag(s) you wish.</p>

## APPENDIX C – PORTS

Port number	Description
143	Incoming IMAP port for plain connection
993	Incoming IMAP port for secured connection (SSL)
25	Outgoing SMTP port for plain connection
465	Outgoing SMTP port for secured connection (SSL)
110	Incoming POP3 port for plain connection
995	Incoming POP3 port for secured connection (SSL)
80	HTTP port for complement services (WebDAV)
443	HTTP port for complement services (WebDAV)
5229	HTTP port for complement services