

SmarterTools Inc.

# Collaboration, Synchronization, and Over-the-Air Mobile Communications with SmarterMail

Configuring and Using SmarterMail with Mobile Devices and Applications

SmarterTools Development Team

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## Overview

SmarterMail is a powerful collaboration mail server that supports the synchronization of calendars, tasks, notes, and contacts on desktop applications like Microsoft Outlook and over-the-air synchronization for most popular mobile devices.

SmarterTools has created this document to help users understand their configuration options and assist them as they configure their phones and email. The information in this document covers the following applications and devices:

- BlackBerry
- iPhone
- Microsoft Outlook
- Mozilla Thunderbird
- Smartphones
- Windows Mobile devices

## Who Should Use This Document

This document is intended to be used in conjunction with SmarterMail online help documentation, Knowledge Base articles (KBs), and other SmarterTools reference sources as part of an overall solution. It should be used by:

- Hosting companies, Internet Service Providers (ISPs), and IT professionals as part of a complete SmarterMail communications solution for their customers
- Individual users of SmarterMail seeking to maximize the functionality and features of the SmarterMail account

## Microsoft Outlook 2003, 2007 and above

### SmarterMail 3.3 or Higher

Synchronization of contacts, calendars, tasks, and notes with Microsoft Outlook 2003, 2007, and higher can be accomplished when using the Enterprise edition of SmarterMail 3.3 or higher (3.0 through 3.2x users can upgrade to 3.3 at no additional cost). Within the SmarterMail Web interface, users can go to the Settings area and look at the SmarterMail Client Utilities to find the appropriate version of SmarterMail Sync for Outlook.

### Additional Options for SmarterMail 5.5 or Higher

For those users who choose not to use the SmarterMail Sync tools, an alternate solution is available for contacts, calendars, tasks, and notes using the Enterprise edition of SmarterMail 5.5 or higher by using the Outlook plug-in from [www.funambol.com](http://www.funambol.com) (an open source solution provider). The client provided by Funambol uses the SyncML 1.2 protocol, which is included within the Enterprise edition SmarterMail 5.5 or higher. Within the SmarterMail interface, click the **Settings** button on the main toolbar and select **SyncML** in the My Settings folder from the left tree view to see what clients have connected to your mailbox and attempted syncing. Logging of information, last successful synchronization, decision rules, and the ability to reset synchronization of devices is available from this area.



In addition to the synchronization available on all editions of SmarterMail 3.0 or higher, users can attach calendars and contacts to Microsoft Outlook 2003 or higher in read-only mode. This uses what is called the WebDAV protocol, and can be initiated through the SmarterMail Web interface by clicking on the **Collaborate** button on the main tool bar and selecting any calendar from the left tree view. Within the calendar you will see the Add to Outlook icon on the action bar. Selecting this icon will invoke an intuitive process to attach that calendar in read-only format. The same steps can be repeated in a similar process for contacts.

For messages, users should setup an account within Microsoft Outlook using either IMAP or POP3. IMAP is a newer protocol and keeps all messages and folders on the server. By using IMAP, you are able to log in to the SmarterMail Web interface from anywhere and have access to the same messages and folders. Likewise, other mobile applications would be able to access the same messages. Additional information about IMAP and POP3 set up and configuration is available in the SmarterMail online help.

## Mozilla Thunderbird 2

### SmarterMail 5.5 or Higher

Synchronization of contacts and calendars with Mozilla Thunderbird 2 can be accomplished when using the Enterprise edition of SmarterMail. This can be accomplished by using the Funambol plug-in and the Lightning plug-in for Thunderbird 2, free downloads from <https://addons.mozilla.org/en-US/thunderbird>. The Funambol plug-in uses the SyncML 1.2 protocol, which is included within the Enterprise edition of SmarterMail 5.5 or higher.



After installing the plug-ins, users will need to configure the Funambol plug-in from within the Thunderbird interface. To configure the plug-in, click **Tools** on the menu bar. Then click Funambol Plug-in and click **Options**. Enter your server location in the server URL field (using the format <http://mail.domainname.com/sync/default.aspx>); enter your username (using the format [username@domainname.com](mailto:username@domainname.com)); and enter your password. Now click on the **Synchronize** tab and select the items you want synchronized (contacts and/or calendar). To synchronize the calendar, you will need to click on the **Details** button and change the remote name to **scal**. Click **OK** and **Click to Synchronize**.

Additional information about installing and configuring these plug-ins is available in the SmarterTools Knowledge Base, which can be accessed via the [SmarterTools Portal](#).

## PocketPC and Smartphones

### SmarterMail 3.3 or Higher

Over-the-air synchronization of contacts, calendars, and tasks with PocketPC and Smartphones utilizing Windows Mobile 2003 and higher can be accomplished with the Enterprise edition of SmarterMail 3.1 and higher (3.0 through 3.2x users can upgrade to 3.3 at no additional cost). Within the SmarterMail Web interface, users can go to the SmarterMail Client Utilities section of the Settings area to find the appropriate version of SmarterMail Sync for PocketPC or SmarterMail Sync for Smartphones.

### Additional Options for SmarterMail 5.5 or Higher

For those users who choose not to use the SmarterMail Sync tools, an alternate solution is available for contacts, calendars, and tasks using the SmarterMail Enterprise Edition 5.5 or higher utilizing the PocketPC or Smartphone plug-in from [www.funambol.com](http://www.funambol.com) (open source solution provider). The client provided by Funambol uses the SyncML 1.2 protocol, which is included within the Enterprise edition of SmarterMail 5.5 or higher. Within the SmarterMail interface, click the **Settings** button on the main toolbar and select **SyncML**

in the My Settings folder from the left tree view to see what clients have connected to your mailbox and attempted synching. Logging of information, last successful synchronization, decision rules, and the ability to reset synchronization of devices is available from this area.

For messages, users should setup an account within the Pocket Outlook application provided on the mobile device using either IMAP or POP3. IMAP is a newer protocol and keeps all messages and folders on the server. By using IMAP, you are able to log into the SmarterMail Web interface from anywhere and have access to the same messages and folders, as well as accessing them with a desktop application like Microsoft Outlook. Additional information about IMAP and POP3 set up and configuration is available in the SmarterMail online help.



## BlackBerry

### SmarterMail 5.5 or Higher

Over-the air synchronization of contacts, calendars, tasks, and notes can be accomplished with the Enterprise edition of SmarterMail 5.5 or higher. This can be accomplished by the BlackBerry PIM Sync Plug-in, a free download from [www.funambol.com](http://www.funambol.com) (open source solution provider). The provider supports most Blackberry devices, and SmarterTools has tested models 8830, 8810, and Curve devices. The client provided by Funambol uses the SyncML 1.2 protocol, which is included within the Enterprise edition of SmarterMail 5.5 or higher.



Within the SmarterMail interface, click the **Settings** button on the main toolbar and select **SyncML** in the My Settings Folder from the left tree view to see what clients have connected to your mailbox and attempted syncing. Logging of information, last successful synchronization, decision rules and the ability to reset synchronization of devices is available from this area.

For regular and push email usage, SmarterTools offers the following methods:

- 1) The Blackberry Internet Service is a free method to push email to your Blackberry and is a service provided by your mobile phone provider (Sprint, Verizon, etc.) and can be configured to check your SmarterMail mailbox and push all new and unread messages to your mobile phone. Messages are normally pushed to the Blackberry device with a 5 to 10 minute delay. This can be configured with any version of SmarterMail as the BlackBerry Internet Service will connect to the mailbox via the IMAP protocol.
- 2) An alternative free method to push messages to your mobile phone which is normally only delayed a couple minutes and simulates the expensive Blackberry Enterprise Server (BES) which is often associated to Microsoft Exchange is to use the open source provider Funambol ([www.funambol.com](http://www.funambol.com)). By signing up with the free Funambol service, you can (just as with the BlackBerry Internet Service), configure Funambol to scan your SmarterMail mailbox for new and unread messages. If a new message is found, the Funambol service will push the message to the Blackberry device and the Funambol client program. When you sign up for the Funambol service, they will provide you the appropriate client that should be installed on your Blackberry device. This method provides a significant cost savings over the formal BES method with only a modest diminishment in performance.
- 3) Since the Blackberry is focused on pushing email, many consumers who are familiar with IMAP and PocketPCs miss the advantage of having access to all their messages that they see within Outlook or the Web mail interface. For people who would like to log into the SmarterMail mailbox from the Blackberry and see all of their messages as if they were in Web mail, additional clients can be installed on the Blackberry, such as the free and open source application LogicMail (<http://www.logicprobe.org/proj/logicmail>).

## iPhone and iPhone 3g

### SmarterMail 5.5 or Higher

Over-the-Air synchronization of contacts (calendars and tasks coming soon) can be accomplished with the Enterprise edition of SmarterMail 5.5 or higher. This can be accomplished by using the iPhone Plug-in, a free download from [www.funambol.com](http://www.funambol.com) (open source solution provider).

**Note:** The original iPhone running firmware version 1.x requires that you have decided to “jailbreak” your iPhone, allowing applications to be installed on the iPhone. iPhone devices running firmware 2.0 or higher can download the Funambol plug-in directly from the Apple iTunes AppStore at no charge.

The client provided by Funambol uses the SyncML 1.2 protocol which is included within the Enterprise edition of SmarterMail 5.5 or higher. Within the SmarterMail interface, click the **Settings** button on the main toolbar and select **SyncML** in the My Settings folder from the left tree view to see what clients have connected to your Mailbox and attempted synching. Logging of information, last successful synchronization, decision rules and the ability to reset synchronization of devices is available from this area.

For messages, users should setup an account within the iPhone mail application provided on the mobile device using either IMAP or POP3. IMAP is a newer protocol and keeps all messages and folders on the server. By using IMAP, you are able to log into the SmarterMail Web interface from anywhere and have access to the same messages and folders, as well as accessing them with a desktop application like Microsoft Outlook.





## Glossary

The following is a list of acronyms used in this document.

|             |                                  |               |                                     |
|-------------|----------------------------------|---------------|-------------------------------------|
| <b>BES</b>  | Blackberry Enterprise Server     | <b>PIM</b>    | Personal Information Management     |
| <b>IP</b>   | Internet Protocol                | <b>POP</b>    | Post Office Protocol                |
| <b>IMAP</b> | Internet Message Access Protocol | <b>PUSH</b>   | An Information Delivery Methodology |
| <b>ISP</b>  | Internet Service Provider        | <b>SMTP</b>   | Simple Mail Transfer Protocol       |
| <b>KB</b>   | Knowledge Base (article)         | <b>SyncML</b> | Synchronization Markup Language     |

## Important Notices

The recommendations in this document reflect the opinions of its author(s) only and are based upon their knowledge and experience. No warrantee or guarantee is expressed or implied as to the efficacy or viability of the information in this document for a particular environment or application.

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Comments regarding the contents of this document should be sent to: [sales@smartertools.com](mailto:sales@smartertools.com)