Universal Mail Archiver for SuperOffice CRM

Installation

A universal mail archive tool for computer and mobile devices.

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Welcome to the Universal Mail Archiver for SuperOffice CRM

1

Overview of the installation steps

The following section gives a short overview of all the installation steps, on the oncoming pages the installation steps are described in detail.

General installation steps

System requirements
Before you start with the installation please read the following knowledge base article about the system requirements.
http://kb.infobridge.com/hc/en-us/articles/202941591

Product Registration
Registration is done over the internet. Therefore a working internet connection is required.
Please read the following knowledge base article about the registration process.
http://kb.infobridge.com/hc/en-us/articles/203821791

Universal Mail Archiver for SuperOffice CRM

2

Installation of the Universal Mail Archiver

The following section gives a short overview of the installation steps.

Installing the Universal Mail Archiver

To install Universal Mail Archiver for SuperOffice CRM run the corresponding installation application and follow the directions given by the installer.

NOTE
When the .NET Framework is not installed on the computer the .NET Framework will be installed before the Universal Mail Archiver setup continues.

When you have selected the "Start configuration" option in the last step of the installation the "**Universal Mail Archiver Configurator**" will start and the configurator screen appears.

Universal Mail Archiver configuration (SuperOffice NetServer)

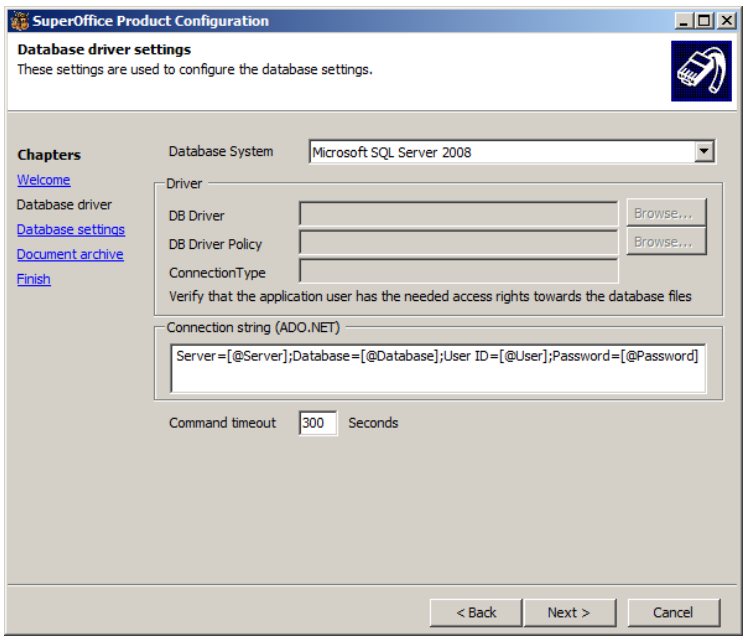
Before you can use the Universal Mail Archiver you have to configure NetServer for SuperOffice CRM. This topic will guide you through all the steps for a successful configuration of NetServer.

Step 1: Welcome

The welcome screen is shown. And you have to press the "**Next >**" button to start the configuration.

Step 2: Database driver settings

The "**Database driver settings**" screen is shown; here you must configure your database settings.



- Select the Database System from the list.

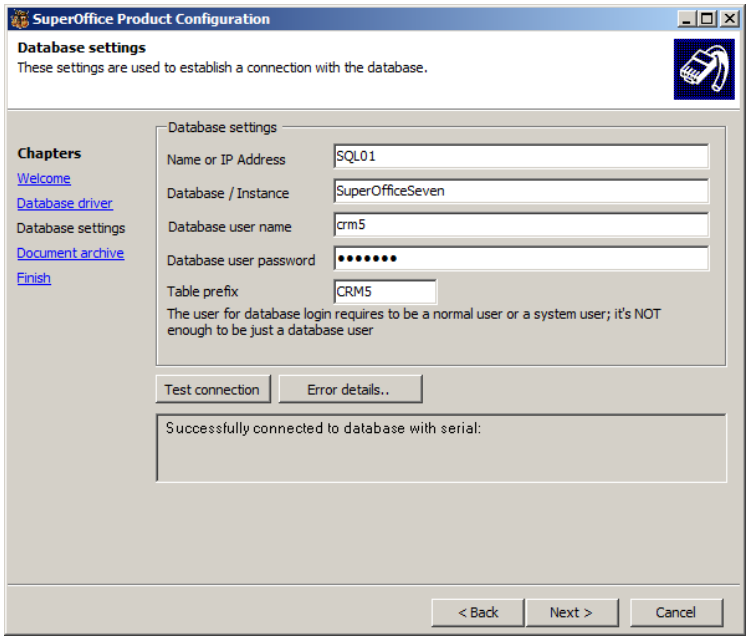
> **WARNING**
> *Do **NOT** change the connection string settings unless you have enough knowledge about this topic!*

- Press "**Next >**".

Step 3: Database settings

The "**Database settings**" screen is shown; here you must configure your database settings.

- Fill in the "**Name or IP Address**" field; this must be the name of your database server where the database system is running or the IP address of that server.
- Fill in the "**Database / Instance**" field; this is the database or instance name of the SuperOffice database.
- Fill in the "**Database user name**" field; set the user name to log on to NetServer (CRM5 or CRM7).
- The "**Table prefix**" field must be CRM5 unless you have created another table prefix for SuperOffice (crm5myd or crm7myd).

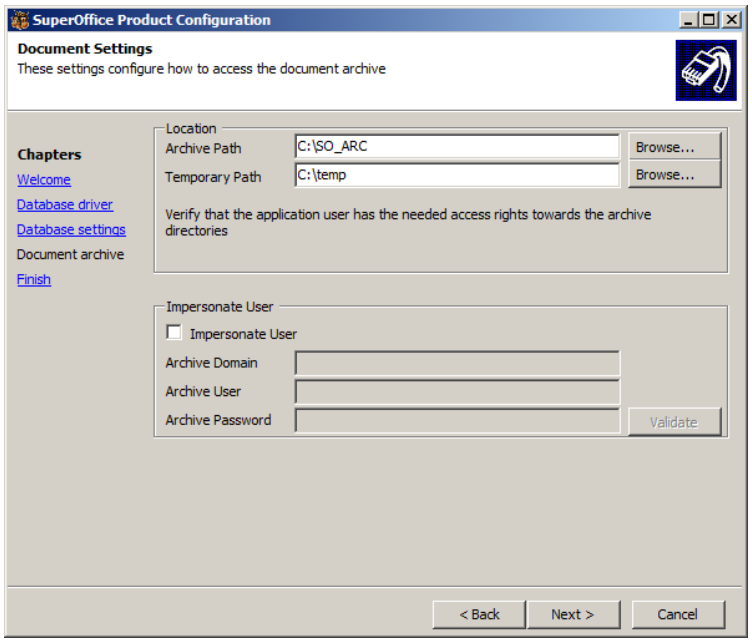


- Press "**Test connection**" to test the database settings you have entered!
- If the connection is successful press "**Next >**"; If the connection fails then edit or review your settings and test the connection again.

> **NOTE**
> *If the connection problem persists, contact your supplier or go to http://kb.infobridge.com to review the Frequently Asked Questions.*

Step 4: Document Archive

The "**Document Archive**" screen is shown; here you can configure your "**Archive Path**" folder and your "Temporary Path" folder; Press "**Next >**" to continue.

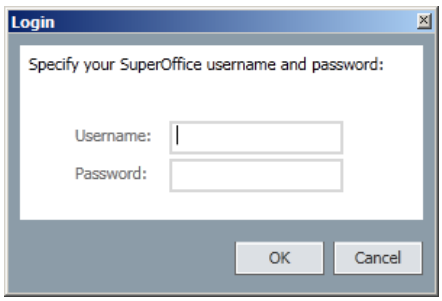


Step 6: Finish

The configuration is now completed, press "**Finish**".

Step 7: Login

The configuration screen of the Universal Mail Archiver is shown, login with your SuperOffice credentials and press "**OK**".



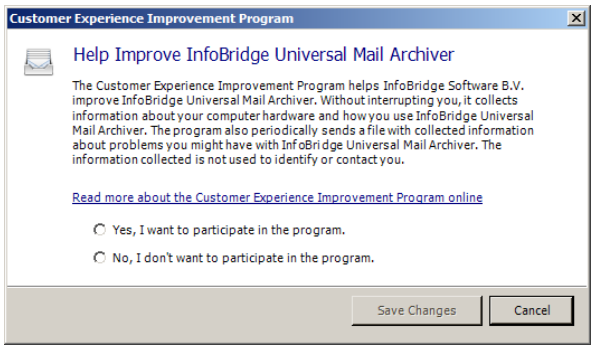
NOTE

If the Universal Mail Archiver is not registered you receive a message that tells you to register the Universal Mail Archiver application first before continuing the configuration. Press the link http://kb.infobridge.com/hc/en-us/articles/203821791 *for more information about the registration.*

Universal Mail Archiver configuration

Before you can use the Universal Mail Archiver you have to configure Universal Mail Archiver for SuperOffice. This topic will guide you through all the steps for a successful configuration of Universal Mail Archiver.

After restarting the Universal Mail Archiver Configurator you will be asked to participate in the "**Customer Experience Improvement Program**". Make your choice to participate or not and press "**Save Changes**".

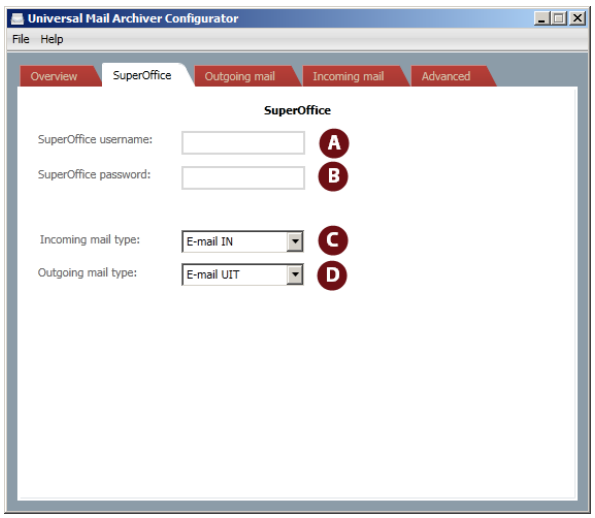


Step 1: Overview

The "**Overview**" tab is shown as default.

Step 2: SuperOffice

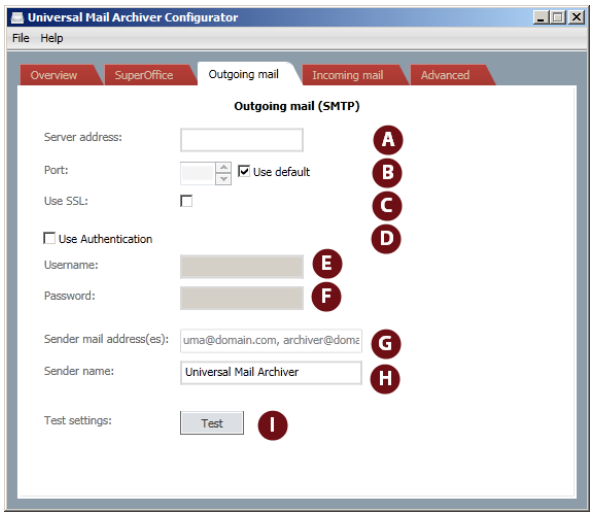
The "**SuperOffice**" tab gives you the ability to set the default SuperOffice user and select the document type that will be used for archiving the e-mails.



A	**SuperOffice username:** Fill in the SuperOffice user name (this can be a SuperOffice System Account).
B	**SuperOffice password:** Fill in the SuperOffice password.
C	**Incoming mail type:** Select a SuperOffice document type for incoming e-mails.
D	**Outgoing mail type:** Select a SuperOffice document type for outgoing e-mails.

Step 3: Outgoing mail

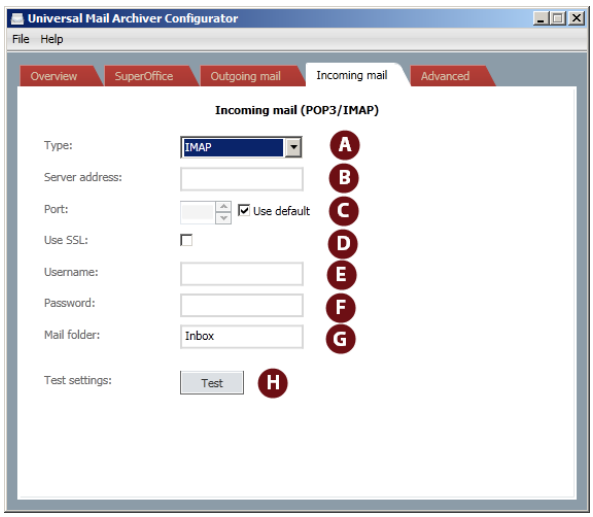
In the "**Outgoing mail**" tab you can set your e-mail server settings for the outgoing e-mails.



A	**Server address:** Fill in the server name or IP address of the mail server your company is using.
B	**Port:** Check the "**Use default**" option to use the default server email port (this is normally port 25) or deselect the "**Use default**" setting to set the email port number of your choice.
C	**Use SSL:** Select this option if you want to use SSL.
D	**Use Authentication:** Select this option to add a user name and password for the mailbox you use.
E	**Username:** Fill in the username of the mailbox you use.
F	**Password:** Fill in the password of the mailbox you use.
G	**Sender mail address(es):** Fill in the sender e-mail address. (This can be more than one address separated by a "comma"). Choose a name that your employees can remember easily like "**archiver@domainname.com**" or "**uma@domainname.com**".
H	**Sender name:** Fill in the name of the sender of the e-mail.
I	**Test settings:** Test button to test the settings of the outgoing e-mail (a pop-up form will ask for the e-mail address to send the test e-mail to).

Step 4: Incoming mail

In the "**Incoming mail**" tab you set your incoming e-mail details.

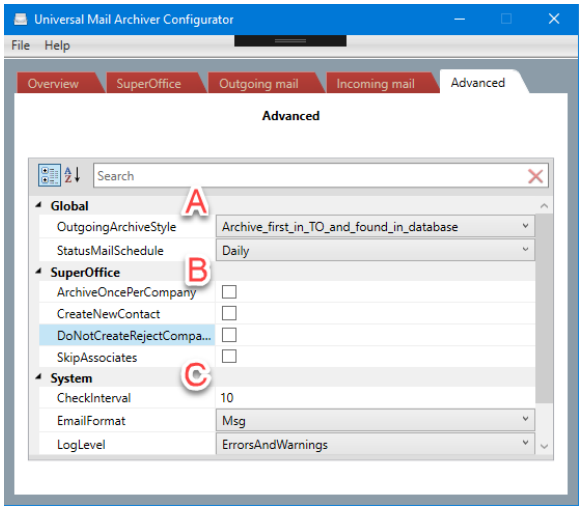


A	**Type:** Select the type of email protocol you want to use for the incoming e-mail (you can choose "IMAP" default setting and "POP3".
B	**Server address:** Fill in the server name or IP address of the incoming mail server

	your company is using.
C	**Port:** Check the "**Use default**" option to use the default server outgoing email port (this is normally port 101 for POP3 and port 143 for IMAP) or deselect the "**Use default**" setting to set the incoming email port number of your choice.
D	**Use SSL:** Select this option if you want to use SSL.
E	**Username:** Fill in the user name of the mailbox.
F	**Password:** Fill in the password of the mailbox.
G	**Mail folder:** Default this is the inbox of mail user.
H	**Test settings:** Test button to test the settings of the outgoing e-mail.

Step 5: Advanced

In the "**Advanced**" tab you can press the "**Show advanced settings (I am an expert)**" button if you are an expert to do some expert settings for Universal Mail Archiver.



A	**Global:** ▪ ***OutgoingArchiveStyle:*** ***Archive_first_in_TO_and_found_in_database;*** Only archive the e-mail for the first person's e-mail that is in the TO address field of the e-mail message and that is found in the SuperOffice database. ***Archive_all_in_TO_field;*** Archive the e-mail for all persons who are in the TO address field of the e-mail message. ***Archive_all_in_TO_and_CC_field;*** Archive the e-mail for all persons who are in the TO- and CC address field of the e-mail message. ▪ ***StatusMailSchedule:*** ***Daily;*** Send a daily status overview e-mail to the person who did the archiving. ***Weekly;*** Send a weekly status overview e-mail to the person who did the archiving. ***Never;*** No status e-mail will be send.
B	**SuperOffice:** ▪ *ArchiveOncePerCompany;* Archive only one e-mail for the company. ▪ *CreateNewContact;* Try to create a new contact and archive mail for contacts that do not exists in SuperOffice. When unable to create a new contact, the e-mail is archived to rejected company, when *DoNotCreateRejectCompany* is disabled ▪ *DoNotCreateRejectCompany;* Do not archive e-mail for rejected companies that do not exists in SuperOffice. ▪ *SkipAssociates;* Archive/Do not archive the e-mail for the associates in the e-

mail message.

C **System:**

- ***CheckInterval****;* Set the check interval for the archiver to archive the e-mail into SuperOffice (minutes).
- ***EmailFormat:***

  Eml/Msg; Only e-mail with the “eml” and “msg” format will be archived.
- ***LogLevel****;* the log file location depends on the Operating System you use. For example in Windows Server 2008 it is located in the following folder “*C:\ProgramData\InfoBridge\InfoBridge UniversalMailArchiver*”.

  ErrorsOnly; Only error messages are saved in the log file.

  ErrorsAndWarnings; Only error and warning messages are saved in the log file.

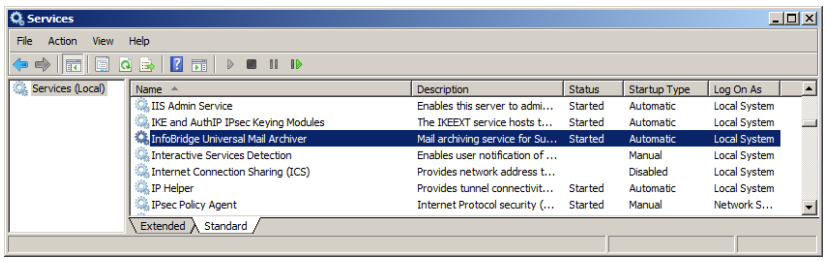
  ErrorsWarningsAndInfo; Only error, warning messages and important notifications are saved in the log file.

  Debug; Error, warning messages, informational and extensive debugging messages are saved in the log file. (Please keep in mind that this option is a highly extensive logging of the complete archive process).
- ***MaxAttachementSize****;* Set the maximum size of the attachments for the e-mails to archive (default is 4096 MB).
- ***StatusMailTime****;* Set the time interval when the Universal Mail Archiver will send a status e-mail for your archived e-mails.

Step 6: The Universal Mail Archiver service

When you have done all your settings and you close the “**Universal Mail Archiver Configurator**” the configurator will ask you if you want to restart the Universal Mail Archiver service and apply the settings you have changed.

You can find the service in the Windows Server services panel.



You are now ready to use the Universal Mail Archiver.

Google POP3/IMAP Settings

The Google Gmail service offers e-mail client access for retrieving and sending e-mails through your Gmail account. However, for security reasons, Gmail uses POP3 over an SSL connection, so make sure your e-mail client supports encrypted SSL connections.

Google Gmail Incoming Mail Server (POP3) - pop.gmail.com (SSL enabled, port 995)

Outgoing Mail Server - use the SMTP mail server address provided by your local ISP or smtp.gmail.com (TLS enabled, port 587).

We prefer IMAP. IMAP provides a better access to your e-mail from multiple devices.

For more information about the Google IMAP settings please follow this link:
http://support.google.com/mail/bin/static.py?hl=en&ts=1668960&page=ts.cs&rd=1

http://www.crmplaza.com/Apps/Universal Mail Archiver

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