

**Kerio Connect**

**Kerio Connect client**

**Kerio Technologies**



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# Kerio Connect client

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## Kerio Connect client

**Kerio Connect client** is a brand new web client - designed to speed up your work!

The following sections will guide you through all the features of our new interface.



Kerio Connect client with all the features described below is available in Kerio Connect 8.0 and newer.

To see all articles about Kerio Connect client, visit [Kerio Knowledge Base](#).

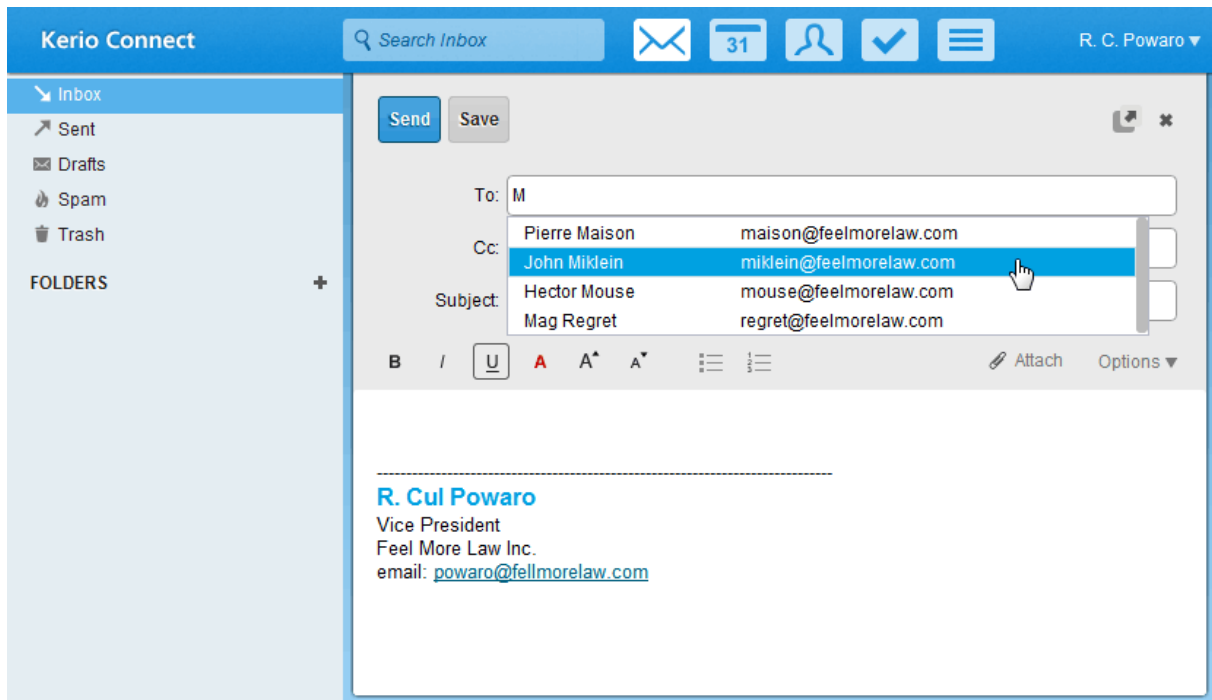
## Email



In the **Email** section in Kerio Connect client you can:

- Use fulltext search — Just type in what you need and search through messages, email addresses, subjects
- Receive less spam — Have you received a spam message? Just click on the Spam button and Kerio Connect will remember
- Add attachments easily — Just drag & drop an attachment into any grey area
- Get automatic email address suggestions
- Save drafts automatically — start a message, go to another folder and come back to finish the message
- Customize your out of office message with text and exact time
- Create filters to sort your messages to folders as they arrive
- Stay on top of new messages with desktop notifications even if you are not currently working with Kerio Connect client

## Kerio Connect client



## Calendar



In the **Calendar** section in Kerio Connect client you can:

- Create events in seconds — just double-click inside your calendar and create an event
- Invite other people to your meeting
- See immediately who's available (Free/Busy calendar)
- Set reminders for your events
- Create repeated events
- Share calendars with other people
- See calendars that other people have shared with you



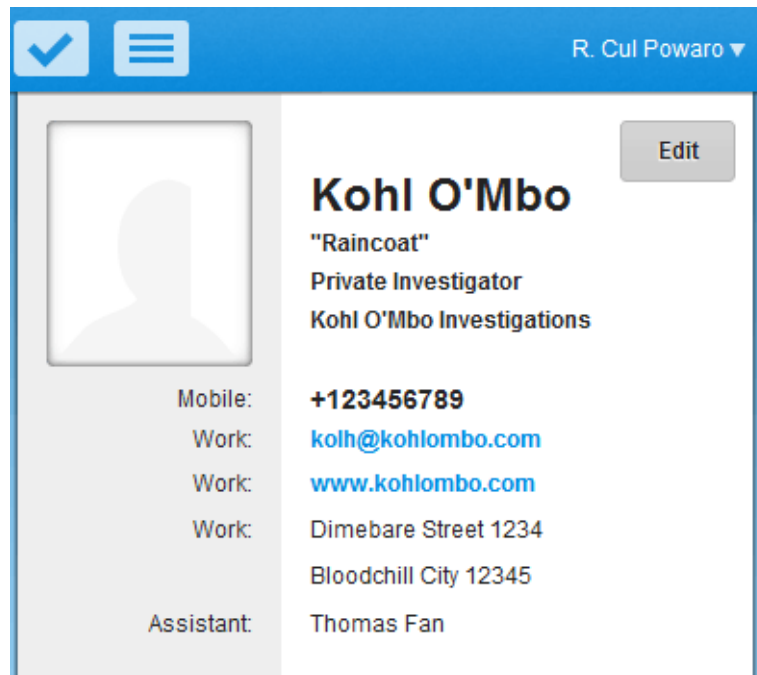
The screenshot displays the Kerio Connect calendar application. The main window shows a weekly calendar for November 2012. On the left, there is a navigation pane with sections for 'NOVEMBER 2012', 'MY CALENDARS' (showing 'R. Cul Powaro'), 'RESOURCES', and 'MEETINGS' (listing 'Brainstorming - the stolen to...' and 'Witness interrogation'). The central calendar grid shows events for Sunday through Thursday. A detailed view of a meeting titled 'Meeting with Meg and John' is open on the right. This view includes fields for location ('officepowaro'), start and end times (3:00 PM to 4:00 PM), attendees ('Mag Regret', 'John Miklein'), and a list of 'Issues to address' such as 'new equipment to buy', 'new hires', 'plans for next month', and 'case progress'. Buttons for 'Send' and 'Cancel' are visible at the bottom of the meeting details.

## Contacts



In the **Contacts** section in Kerio Connect client you can:

- Create contacts easily
- Organize contacts into groups
- Share contacts with other people
- See contacts that other people have shared with you

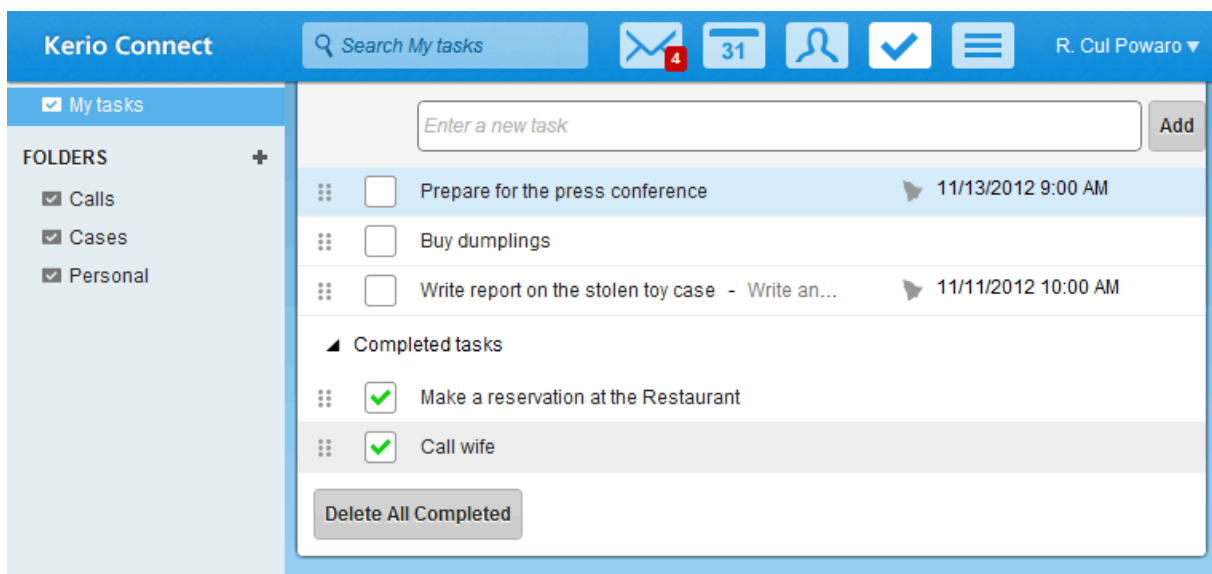


## Tasks



In the [Tasks](#) section in Kerio Connect client you can:

- Create tasks and sort them into groups
- Share task groups with other people



## Notes



In the **Notes** section in Kerio Connect client you can:

- Write color-coded (multi-colored) notes
- Share notes with others
- Send notes as email messages with one click

The screenshot displays the Kerio Connect Notes application interface. At the top, there is a blue header bar with the text "Kerio Connect", a search bar labeled "Search My notes", and several icons including a mail icon with a red notification badge, a calendar icon showing "31", a user profile icon, a checkmark icon, and a menu icon. The user's name "R. Cui Powaro" is visible in the top right corner.

Below the header, the interface is divided into three main sections:

- Left Sidebar:** Labeled "My notes", it contains a "FOLDERS" section with a plus sign and three folder items: "The case of lazy lies", "The case of the accountant", and "The case of stolen toy".
- Center Panel:** Contains a "New Note" button, a trash icon, and a "Send as Message" button. Below these are three note entries in a list:

Color	Note Title	Time
Red	Witness interview notes	10:38 AM
Green	Crime scene notes	10:38 AM
Blue	Shopping list	10:37 AM
- Right Panel:** Shows a preview of the selected note, "Shopping list". The note content is a list of items: "dumplings", "soda", "toilet paper", "chocolate cake", "painkillers", "sleeping pills", "dog food", and "iguana food". Below the note content are five color-coded selection boxes: white, yellow, red, green, and blue.

# Configuring your Kerio Connect client

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## What to configure in your Kerio Connect client



Kerio Connect client is available in Kerio Connect 8.0 and newer.

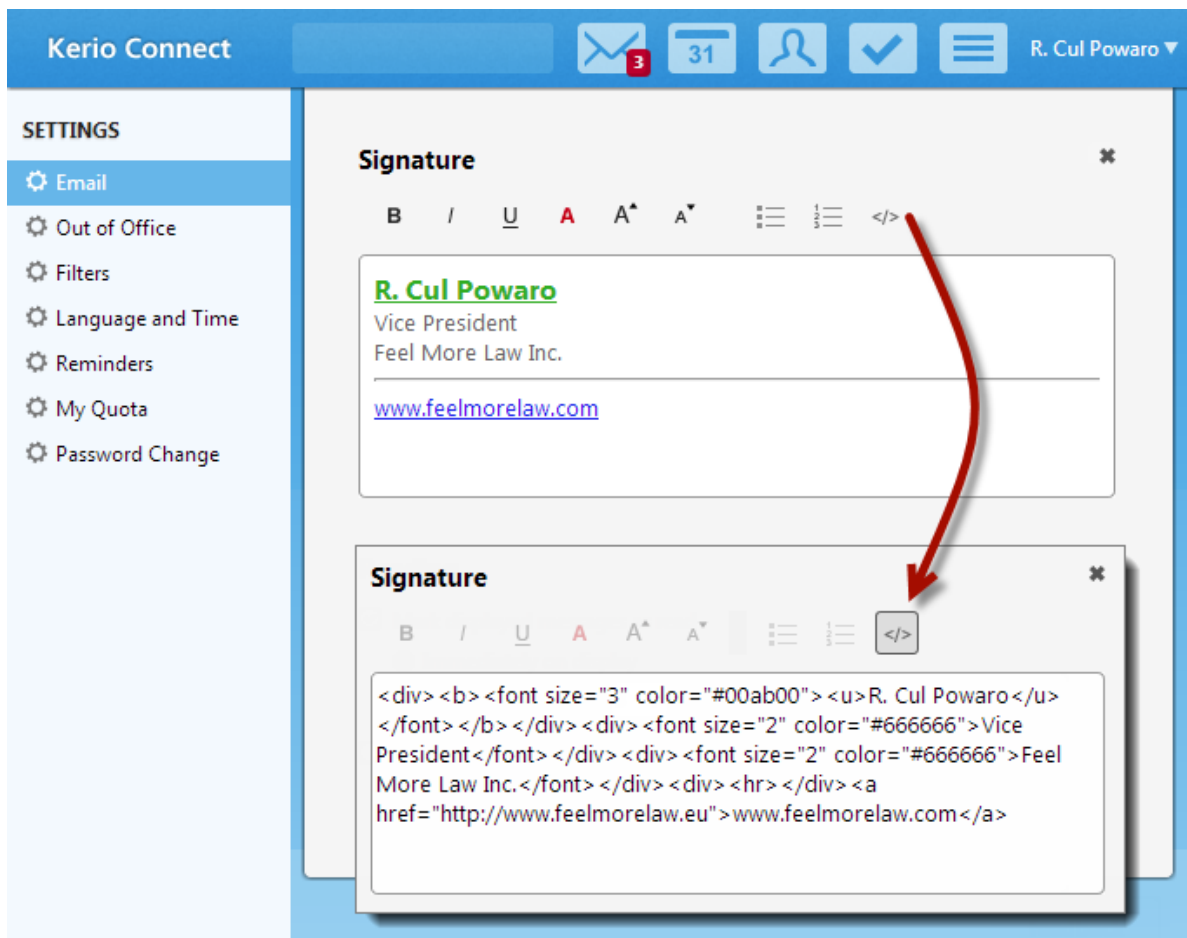
In Kerio Connect client, users can configure the following settings:

- [email signature](#)
- Out of Office message (read article [Configuring the Out of Office message](#))
- mail filters (read article [Sorting email messages in Kerio Connect client](#))
- [interface language](#) and [time zone](#)
- [customize the appearance](#)
- notifications for new messages and event/task reminders (read article [Enabling notification in Kerio Connect client](#))
- [their password](#) (if allowed) and view their [store quota](#)

## Configuring email signature

In Kerio Connect client, you can create a signature which will be automatically appended to every message you write.

1. Click on your name in Kerio Connect client and select **Settings**.
2. Go to section **Email** → **Signature**.
3. Enter whatever you wish to be appended to each of your messages and confirm.  
You can also use HTML code to append your signature (new in Kerio Connect 8.1).



## Setting messages as read



New in Kerio Connect 8.1!

You can specify time after which each message will be marked as read.

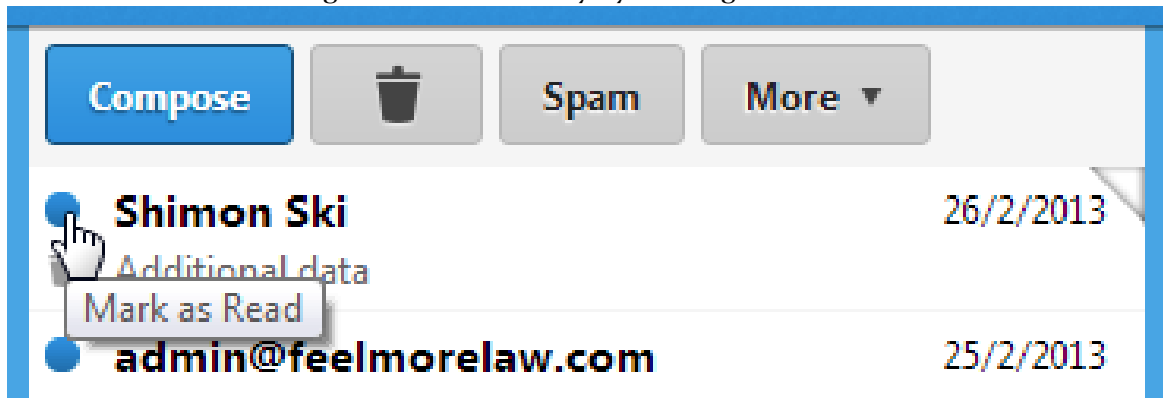
1. Click on your name in Kerio Connect client and select **Settings**.
2. Go to section **Email** → **Reading**.
3. Check option **Mark displayed messages as read** and select **Immediately** or set time interval.

### Reading

- Mark displayed messages as read
  - Immediately on display
  - After displaying for  seconds

#### 4. Save.

You can also mark messages as read manually by clicking the colored dot next to the message.



### Setting language

Kerio Connect client is available in the following languages: Czech, English (US and UK), Chinese, Croatian, Dutch, French, German, Hungarian, Italian, Japanese, Polish, Portuguese, Russian, Slovak, Spanish, and Swedish.

To select a language for your interface:

1. Click on your name in Kerio Connect client and select **Settings**.
2. In section **Language and time**, select your preferred language.
3. Save the settings.



All items, such as messages, contacts, events and tasks, in all folder types will also be sorted by the alphabet of this language.

Each language also has its own rules for displaying time and date. See the following section for more details.

## Configuring time

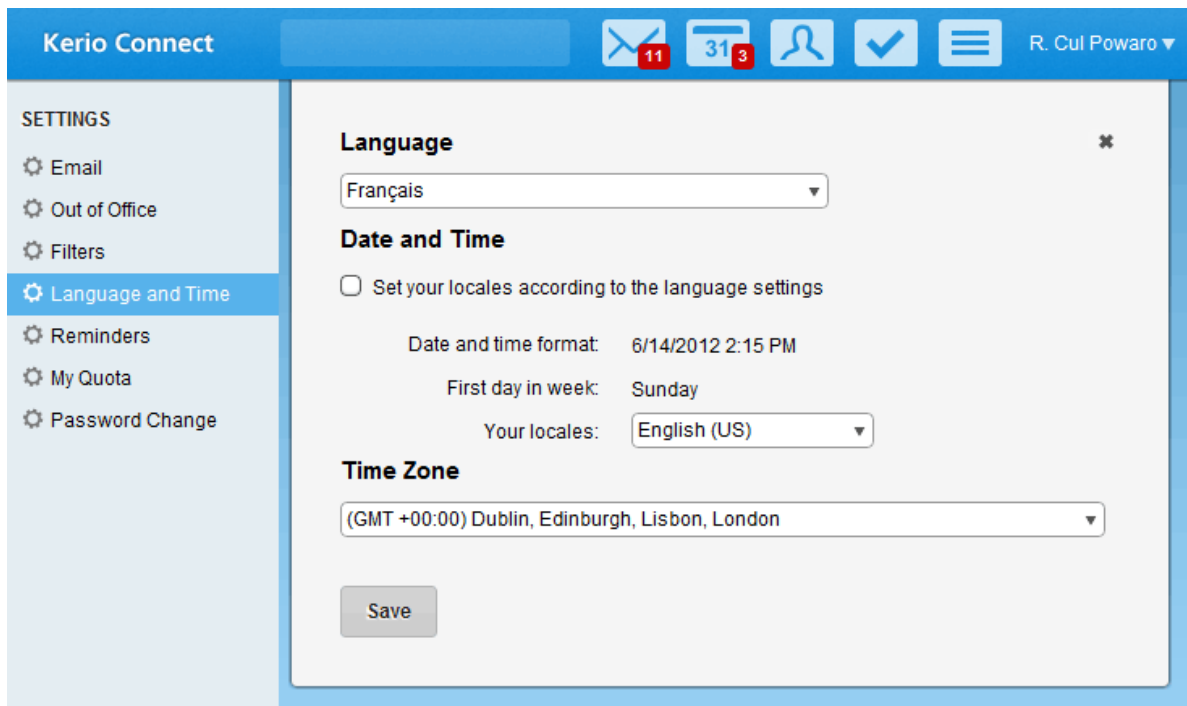
Time settings are important for correct time when sending and receiving messages.

By default, Time zone settings are based on Kerio Connect server. If you plan to use Kerio Connect client in a time zone different from the server location, you can change the time settings:

1. Click on your name in Kerio Connect client and select **Settings**.
2. In section **Language and time**, select your preferred time zone.
3. Select **Set your locales according to ...** to display date and time (i.e. locales) according to your [preferred language](#).

If you wish to use other rules, select the language for your locale.

4. Save the settings.



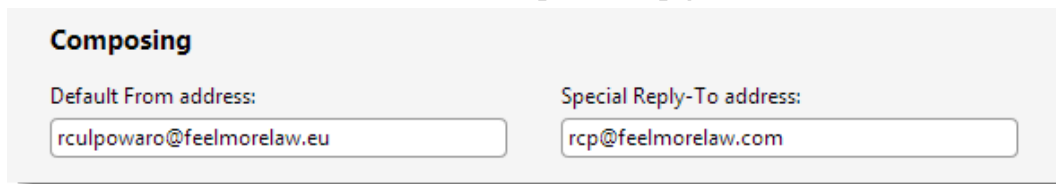
## Configuring your Kerio Connect client

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### Setting email addresses

In Kerio Connect client, you can set your **From** and **Reply-To** addresses.

1. Click on your name in Kerio Connect client and select **Settings**.
2. Go to section **Email** → **Composing**.
3. Enter **Default From address** and/or **Special Reply-To address**.



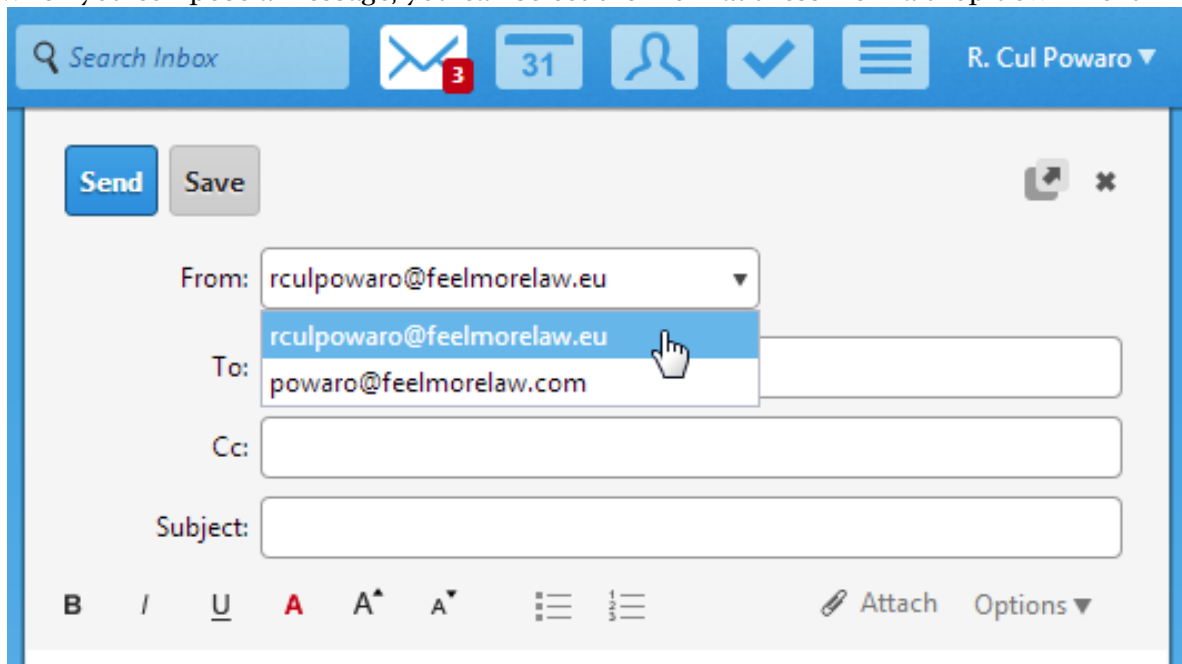
**Composing**

Default From address:

Special Reply-To address:

4. **Save**.

When you compose a message, you can select the From address from a drop-down menu.



Search Inbox [3] 31 [User Icon] [Checkmark] [Menu] R. Cul Powaro ▾

Send Save [Close] [Refresh]

From:  ▾

To:

Cc:

Subject:

**B** / U **A** A\* A\* [List Icon] [List Icon] [Attach] Options ▾

### Changing your password

To change your account password:

1. Login to Kerio Connect client securely via HTTPS.
2. Click on your name in Kerio Connect client and select **Settings**.



3. In section **Password Change**, type in your current and your new password.
4. Save the settings.



If this option is not available at all, contact your administrator.

## Displaying account quotas

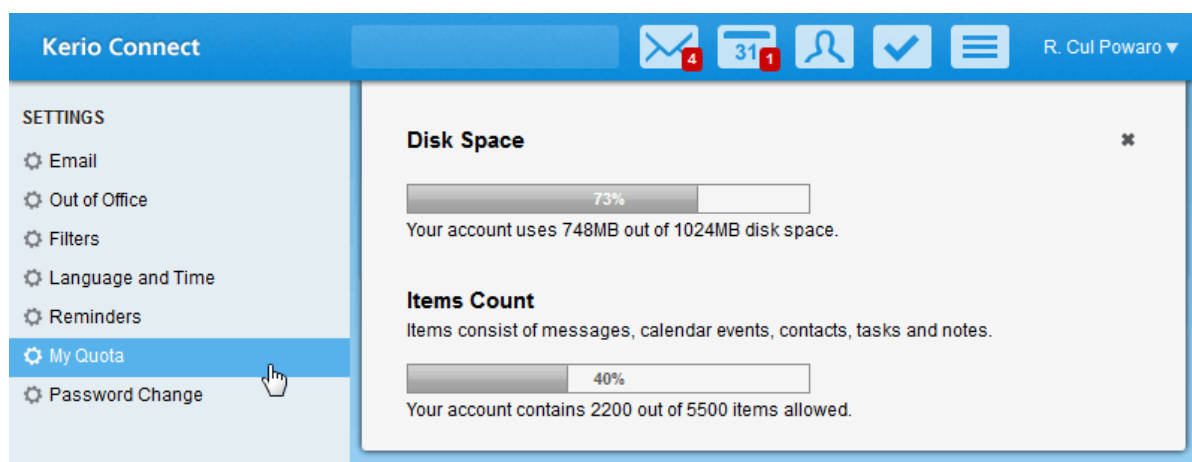
If you receive messages with large attachments or have a lot of contacts, you may soon use up the quotas assigned for your account.

The limitations include:

- space available for you
- number of items allowed

If you wish to see how much space you use:

1. Click on your name in Kerio Connect client and select **Settings**.
2. Go to section **My Quota**.
3. There you can see how much space your account occupies, how many items you have and what are you limitations.

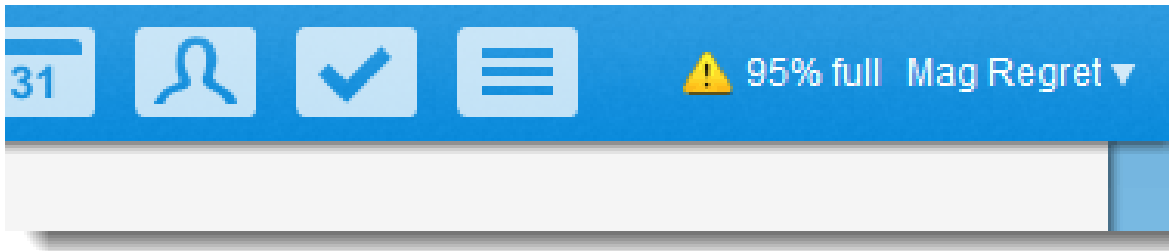


## What to do when the quota is used up

If you reach any of the limits set for your account, you will not be able to receive new messages. Once you reach 90% of a quota, a warning message will be displayed in the top bar of Kerio Connect client.

## Configuring your Kerio Connect client

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To solve this problem, we recommend the following:

- delete messages in folders **Sent** and **Trash** (unless you need them)
- delete any other messages you do not need (especially with large attachments)
- ask your administrator to turn on automatic items clean-out (which will automatically delete old messages and messages from **Trash**)
- ask your administrator to add some space for your account

# Customizing appearance of Kerio Connect client

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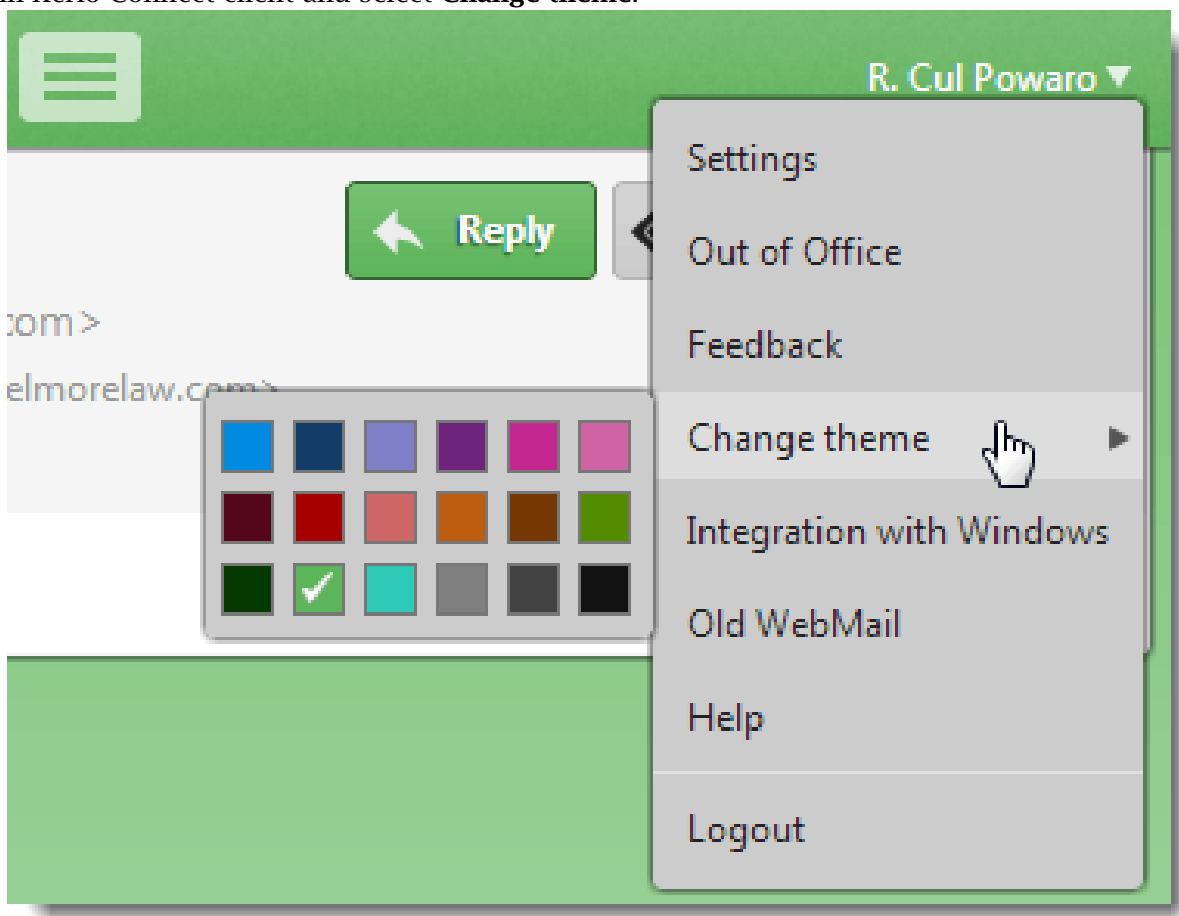
## About customizing

To customize the appearance of their Kerio Connect client, users can:

- [change the color theme](#)
- select the position of [message preview pane](#)
- [hide the folders menu](#)

## Changing color theme

Default color of Kerio Connect client is blue. To select a different color theme, click your name in Kerio Connect client and select **Change theme**.



## Customizing appearance of Kerio Connect client

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This feature is available in Kerio Connect 8.1 and newer.

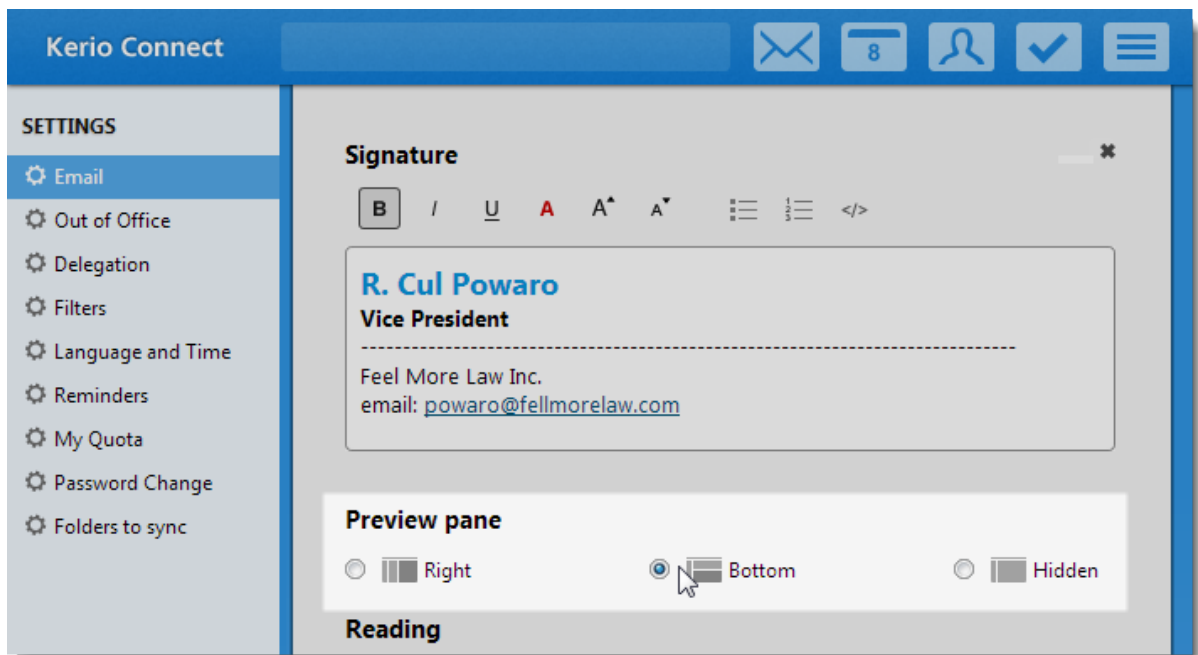
### Previewing messages



New in Kerio Connect 8.2!

In Kerio Connect client, you can select whether you want to display previews of email messages and where.

1. Click your name in Kerio Connect client and select **Settings**.
2. Go section **Email**.
3. In **Preview pane**, select the position of the pane.  
You can also disable it.
4. Save the settings.



### Hiding the folders menu

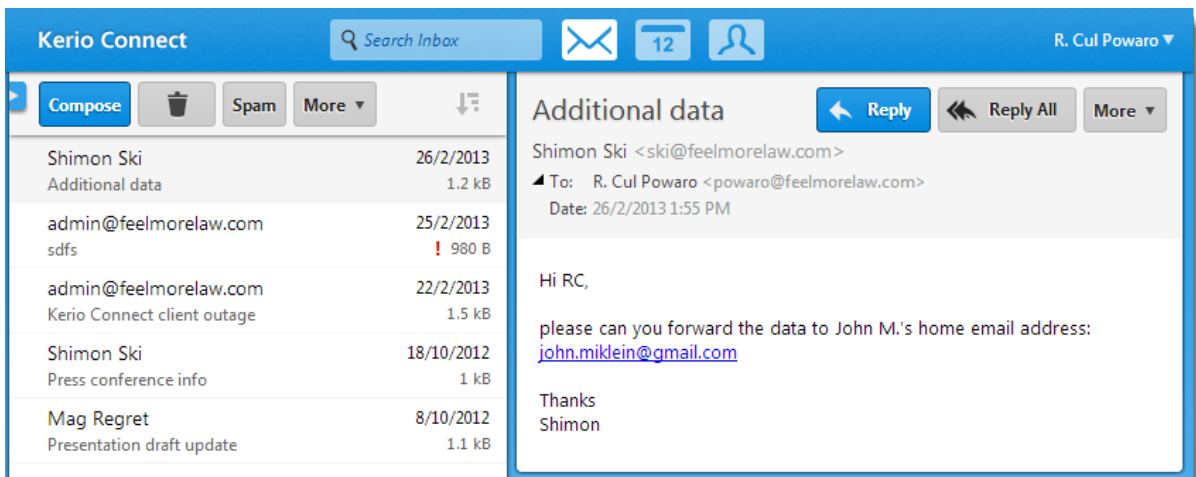
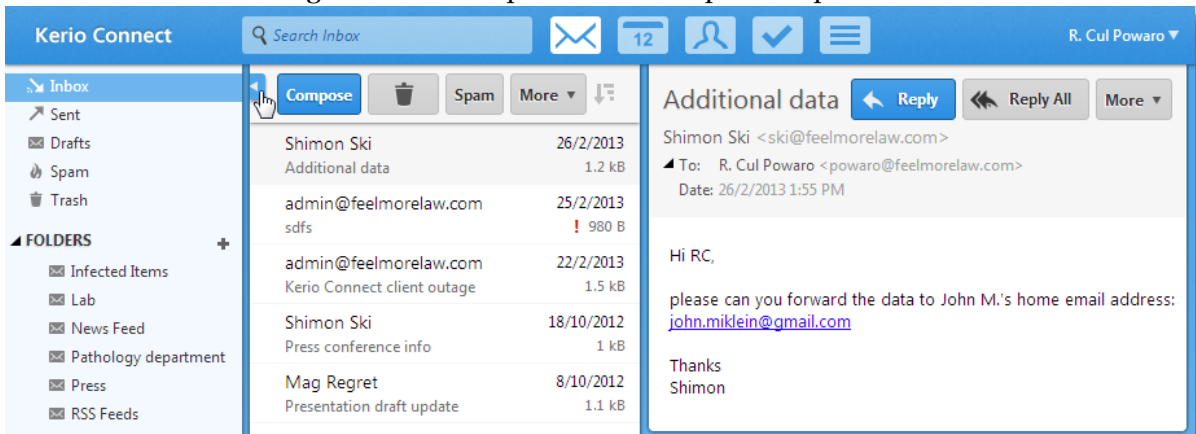


New in Kerio Connect 8.2!

To save some space, you can hide the folder tree on the left. Click on the blue arrow

button  under the **Search** box.

You can hide the tree regardless of the position of the preview pane.



# Configuring the Out of Office message

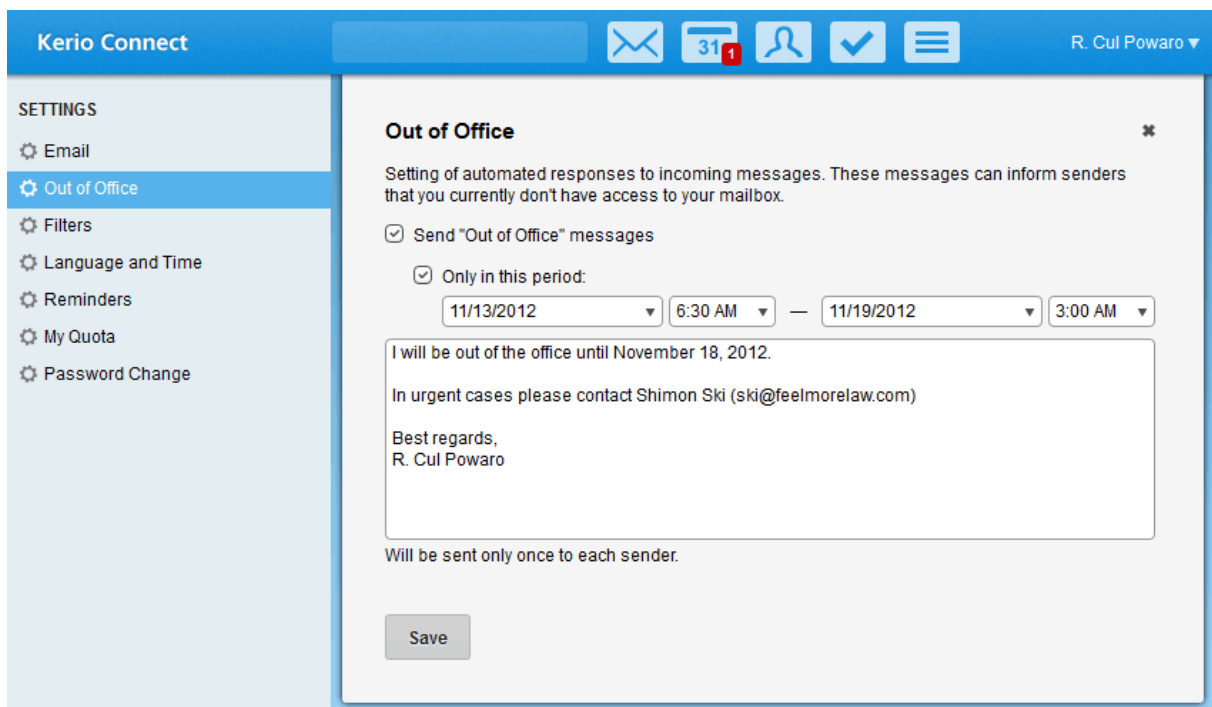
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## Configuring the Out of Office message

Out of Office message is an automatic reply which is sent from your account when you receive a message.

If you plan to go on holiday, you may want to let your business partners and customer know that you are away. To do so, you can configure an out of office message.

1. Click your name in Kerio Connect client and select **Settings**.
2. In section **Out of Office**, check option **Send "Out of Office" messages** .
3. Write your message.
4. You can specify a time period when this automatic reply will be sent.
5. Save the settings.



Kerio Connect sends the out of office message to each sender only once.

# Sorting email messages in Kerio Connect client

## About sorting

In Kerio Connect client, you can sort:

- [messages in individual folders](#) according to different criteria.
- [received messages into folders](#) in your mailbox, or

## Sorting messages within a folder



New in Kerio Connect 8.2!

In Kerio Connect client, you can sort messages according to various criteria.

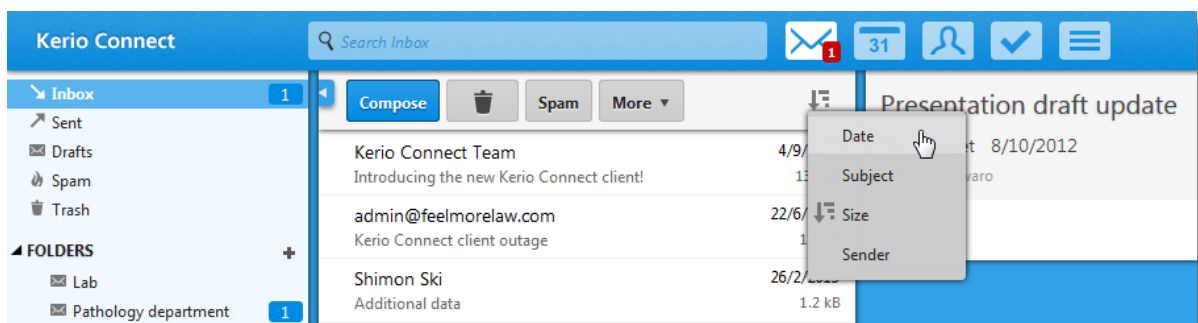
Kerio Connect client remembers your sorting preferences in each individual folder.

### *Preview pane on the right*

1. Go to a folder where you want to sort the messages.



2. Click on the sorting icon
3. Select how to sort the messages.





If you want to sort messages in the reversed order, repeat the same procedure (e.g. if you sort messages by clicking on **Date** and you want to reverse the order, click on **Date** again).

### *Preview pane on the bottom or hidden*

To sort messages, click on any header of the message list.

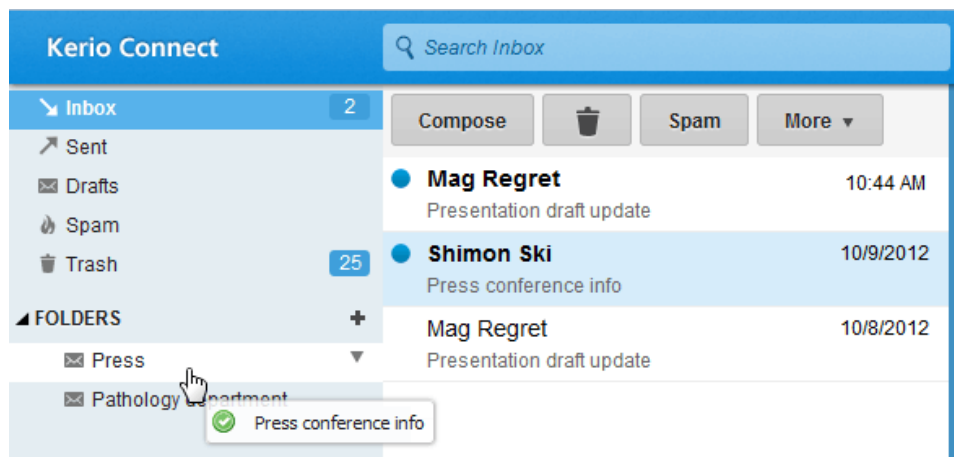
If you want to sort messages in the reversed order, repeat the same procedure (e.g. if you sort messages by clicking on the **Received** header and you want to reverse the order, click on the **Received** header again).

## Sorting messages into folders

Messages delivered to Kerio Connect client are stored in folder **Inbox**.

If you have additional folders, you can move messages:

- manually — drag messages to folders



- automatically — sort messages [using filters](#)

## Creating filters

To sort messages to folders automatically, you can create filters:

- Click on your name in Kerio Connect client and select **Settings**.
- In section **Filters**, click **New Filter**.
- To display all filter settings, click icon
- Set the filter.

## Sorting email messages in Kerio Connect client

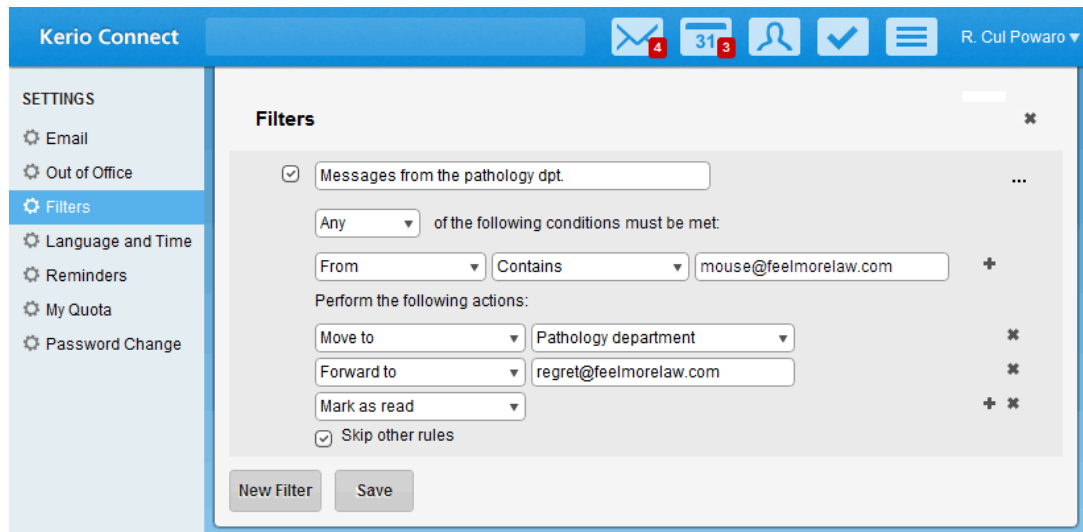


Figure 1 Filter settings

5. You can check option [Skip other rules](#).
6. Save the settings.

You can drag filters to sort the list.

## Using filters

Kerio Connect client checks all delivered messages against all the filters.

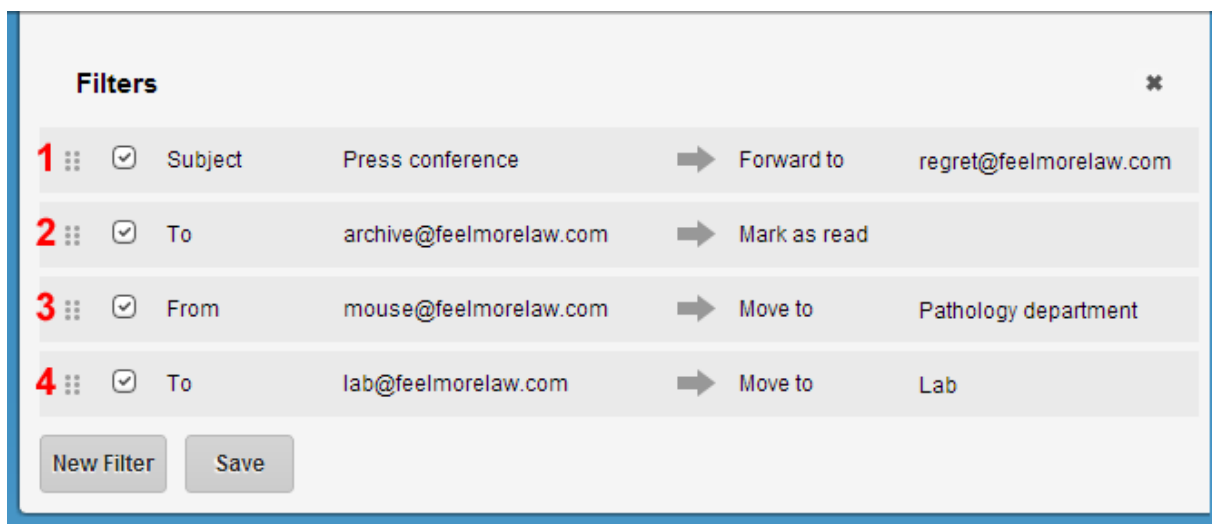


Figure 2 List of filters

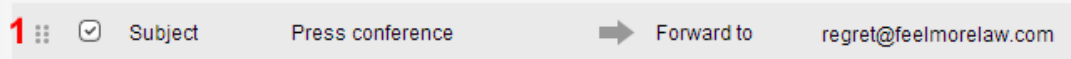
- The order of filters is important — the filter on top of the list is applied first.
- If **Skip other rules** is active, no more filters are applied.

**Example 1:**

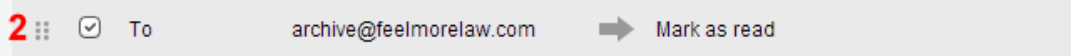
Mr. Powaro receives message **Dept. meeting** from Hector Mouse (email address **mouse@feelmorrelaw.com**).

Kerio Connect checks the filters from 1 to 4:

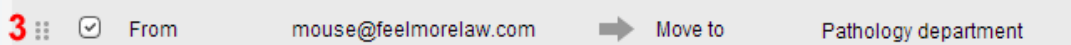
1. Filter 1 forwards messages with subject **Press conference** to **regret@feelmorrelaw.com**. As the subject **is not** **Press conference**, this filter does not apply and Kerio Connect continues with filter 2.



2. Filter 2 marks messages from **archive@feelmorrelaw.com** as read. As the sender **is not** **archive@feelmorrelaw.com**, this filter does not apply and Kerio Connect continues with filter 3.



3. Filter 3 moves messages from **mouse@feelmorrelaw.com** to folder **Pathology department**. This condition is met. The message is moved to folder **Pathology department**. In the filter 3 definition, option **Skip other rules** is enabled. Kerio Connect applies filter 3 and skips other filters.



**Sorting email messages in Kerio Connect client**

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**Example 2:**

Creating a filter for forwarding incoming messages to another address.

**Filters** \*

Forwarding messages to a different address ...

Any ▼ of the following conditions must be met:

All messages ▼ +

Perform the following actions:

Forward to ▼ regret@feelmorelaw.com + \*

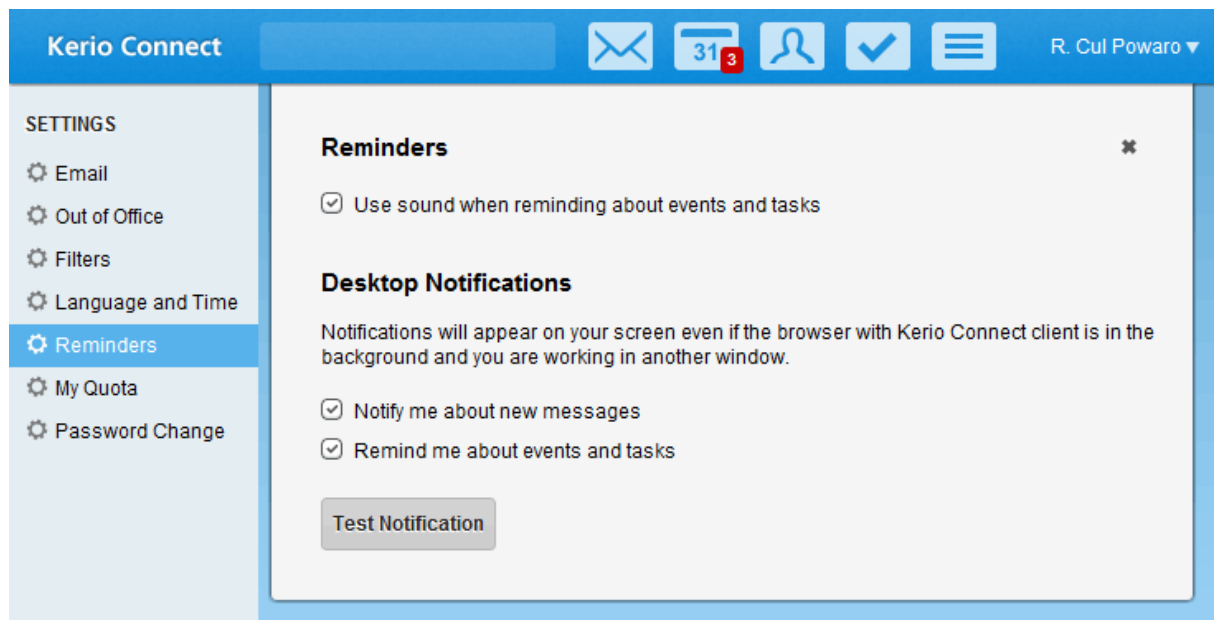
Skip other rules

# Enabling notifications in Kerio Connect

## How to get notified about upcoming events and tasks

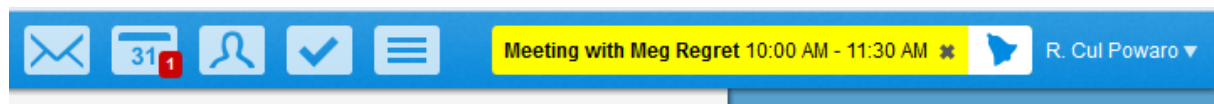
Kerio Connect client can remind you about

- upcoming events and [tasks](#) via [reminders](#)
- new messages and upcoming events and task via [desktop notifications](#) and [pop-up notifications](#)



## Event and task reminders

Reminders for your calendar events and [tasks](#) are displayed automatically in the top bar of your Kerio Connect client — no additional settings are required.



The reminders can be accompanied by a sound. To enable or disable the sound reminders:

1. Click on your name in Kerio Connect client and select **Settings**.
2. In section **Reminders**, select option **Use sound when reminding about events and tasks**.
3. The settings are saved automatically.

## Enabling notifications in Kerio Connect

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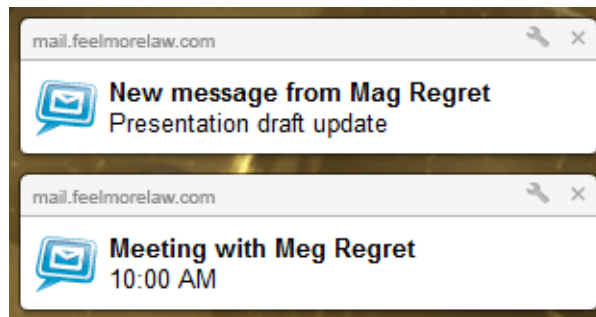
Once a reminder appears:

- click on it to be guided to the appropriate section in Kerio Connect client (Mail, Calendar, Task) and display it in detail
- move mouse over the reminder for options to dismiss or postpone the reminder

### Desktop notifications

Desktop notifications are small pop-up windows which appear on your screen when using the following browsers:

- Chrome
- Safari 6 and newer



To display desktop notifications:

1. Enable the desktop notifications in your browser. The following links will guide you to the individual browser settings for enabling desktop notifications:
  - [Google Chrome](#)
  - [Safari](#)
2. Click on your name in Kerio Connect client and select **Settings**.
3. In section **Reminders**, select the types of notifications (messages and/or events and tasks).



These options are visible only if notifications are enabled in your browser.

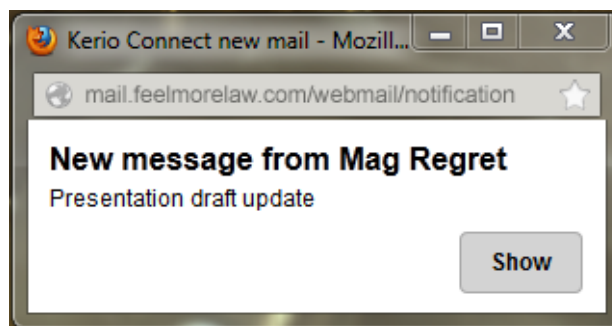
4. **Test Notification** to make sure it works.
5. The settings are saved automatically.

Once a notification appears on your screen, click on it and the new message (event/task) will be displayed in detail.

## Pop-up notifications

Pop-up notifications are small pop-up windows which appear on your screen when using the following browsers:

- Safari 5 and older
- Mozilla Firefox
- Microsoft Internet Explorer



To display pop-up notifications:

1. Disable the pop-up blocker in your browser (or add an exception for your Kerio Connect address). The following links will guide you to the individual browser settings for disabling pop-up blockers:
  - [Mozilla Firefox](#)
  - [Microsoft Internet Explorer](#)
  - [Safari](#)
2. Click on your name in Kerio Connect client and select **Settings**.
3. In section **Reminders**, select the types of notifications (messages and/or events and tasks).



These options are not visible unless you disable the pop-up blocker.

4. **Test Notification** to make sure it works.
5. The settings are saved automatically.


Once a notification appears on your screen, click on it and the new message (event/task) will be displayed in detail.

# Using contacts in Kerio Connect client

---

## Creating contacts

To create a new contact:

1. In Kerio Connect client, go to the **Contacts** section  .
2. Click **New** → **Contact**.
3. Fill in any information.
4. Click **Add** to add additional information (see figure).  
To add items of already displayed information, click the **plus** sign at the right of an item.
5. Click **add photo** and select the contact photo.



The image file must be in the JPG format and cannot exceed 256 kB.

6. **Save** the settings.



The screenshot shows a 'New contact' form with the following fields and values:

- Name: Kohl O'Mbo
- Phone: Raincoat
- Job Title: Private Investigator
- Company: Kohl O'Mbo Investigations
- Mobile: +123456789
- Work Email: kolh@kohlombo.com
- Work Website: www.kohlombo.com
- Address: Dimebare Street 1234
- City: Bloodchill City, State: [blank], Zip: 12345
- Country: [blank]
- Notes: [blank]
- Assistant: Thomas Fan

On the left side, there is a dropdown menu for selecting a contact type, with options: Work, Work, Home, Other. On the right side, there is another dropdown menu for selecting a contact role, with options: Job Title, Instant Messages, Birthday, Anniversary, Prefix, Middle name, Suffix, Nickname, Department, Office, Manager, Assistant.

Figure 1 New contact

## Editing contacts

To edit your contacts, double-click the contact in the list.



To edit public contacts, you must be a [public folder administrator](#).

## Sorting contacts

In Kerio Connect client, contacts are sorted according to contact's **Last name**.

If the last name entry contains more names, the first one is used for sorting.

### Sorting contacts into folders

Your default contact folder is **My contacts**.

To add another folder, click the **plus** sign next to Folders and specify a name.

To move contacts to different folders, drag & drop a contact from its original folder to another in the navigation tree on the left.


### Sharing your contact folders

You can share your contact folders with other users.

1. Right-click a folder and click on **Sharing**.
2. To share with a single user, select **User** and type their name or email.  
To share with a group, select **Group of users** and select a group.  
To share with everyone in your company, select **Everyone from <your domain>**.
3. Specify the sharing rights:
  - can view
  - can change — user can add, delete and edit the contacts
  - is owner — can set sharing, can add, delete and edit the contacts
4. Repeat steps 2 and 3 as needed.
5. Click **OK**.

### Displaying shared contact folders

If someone shares a contact folder with you:


1. In the Kerio Connect client, go to the **Contacts** section  .
2. Click the **plus** sign next to **Shared folders**.
3. In the list of available folders, click those you want to display.

Now you can work with the shared contacts.

# Using tasks in Kerio Connect client

## Creating tasks

To create a new task:

1. In Kerio Connect client, go to the **Task** section .
2. Specify the task in the **Enter a new task** field.
3. Click **Add**.

Double-click the task to:

- add reminder date and time (for info on reminders, read article [Configuring your Kerio Connect client](#))
- add notes about the task

Once you are done, **Save** the task.

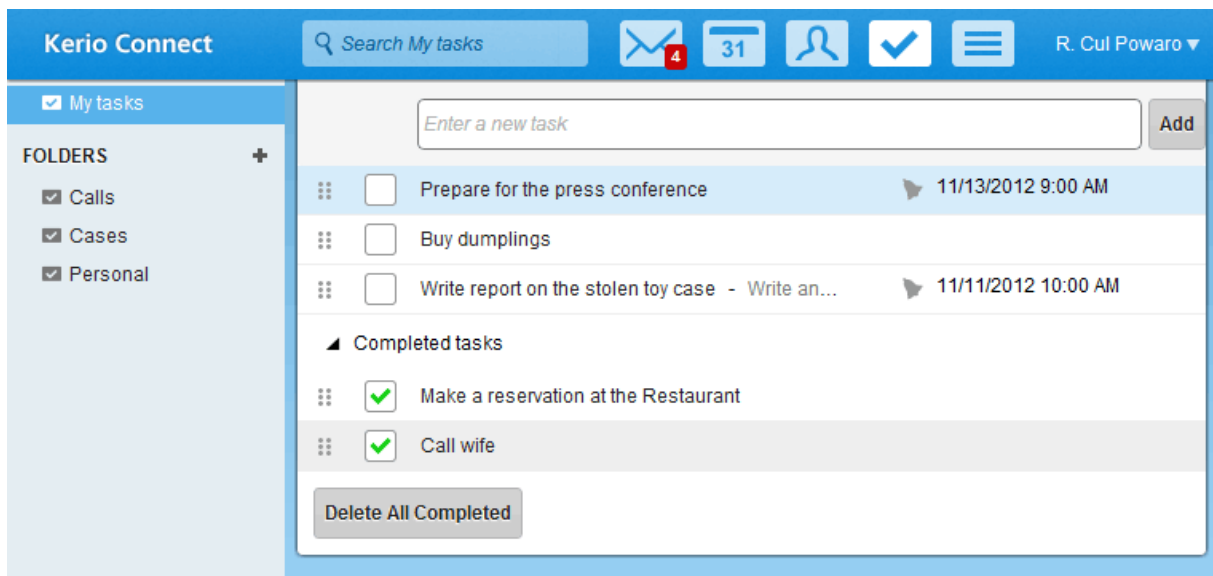


Figure 1 Tasks

### Working with tasks

The task section allows you to:

- [sort your task into folders](#).
- mark tasks as complete (click the white square on the left side)

Finished tasks can be viewed in the **Completed tasks** section.

To remove a task, right-click the task and select **Delete**.

### Sorting tasks into folders

Your default task folder is **My tasks**.

To add another folder, click the **plus** sign next to Folders and specify a name.

To move tasks to different folders, drag & drop a task from its original folder to another in the tree on the left.

### Sharing your task folders

You can share your tasks folders with other users.

1. Right-click a folder and click on **Sharing**.
2. To share with a single user, select **User** and type their name or email.  
To share with a group, select **Group of users** and select a group.  
To share with everyone in your company, select **Everyone from <your company>**.
3. Specify action users can do:
  - can view
  - can change — user can add, delete and edit the tasks
  - is owner — can set sharing, can add, delete and edit the tasks
4. Repeat steps 2 and 3 as needed.
5. Click **OK**.

## Displaying shared folders

If someone shares you a task folder:



1. In Kerio Connect client, go to the **Task** section.
2. Click the **plus** sign next to **Shared folders**.
3. In the list of available folders, click those you want to see in your task section.

Now you can work with the shared task.

# Using delegation in Kerio Connect client

## About delegation

Delegation is an advanced typed of [sharing](#). A **delegate** can act on your behalf.

Delegation includes:

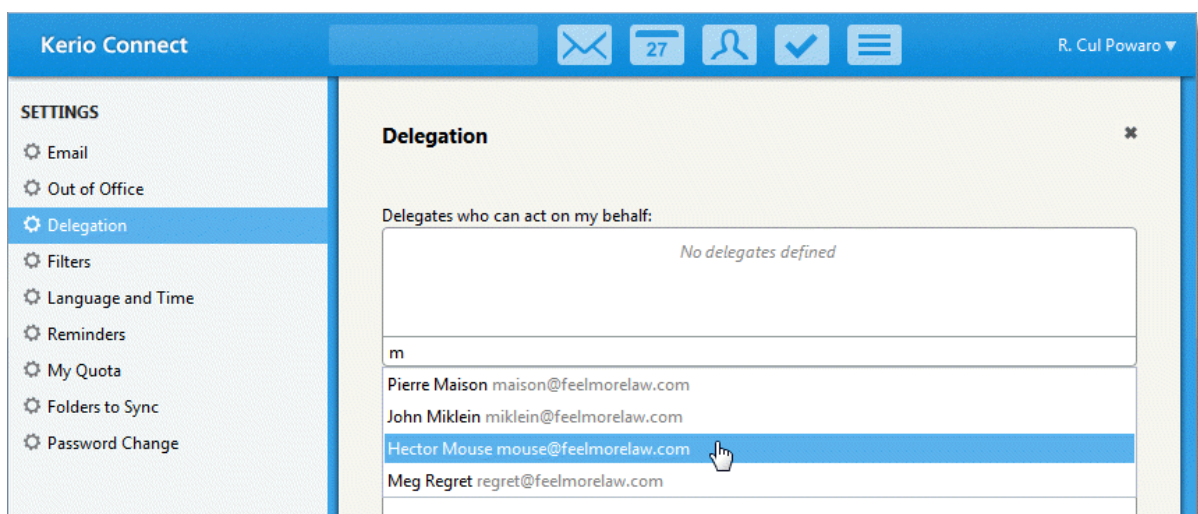
- Inbox
- Main calendar

Use the traditional [sharing feature](#) to share contacts, notes and tasks.

You must [assign delegation rights](#) to users. Delegates can then [act on your behalf](#).

## Delegating users

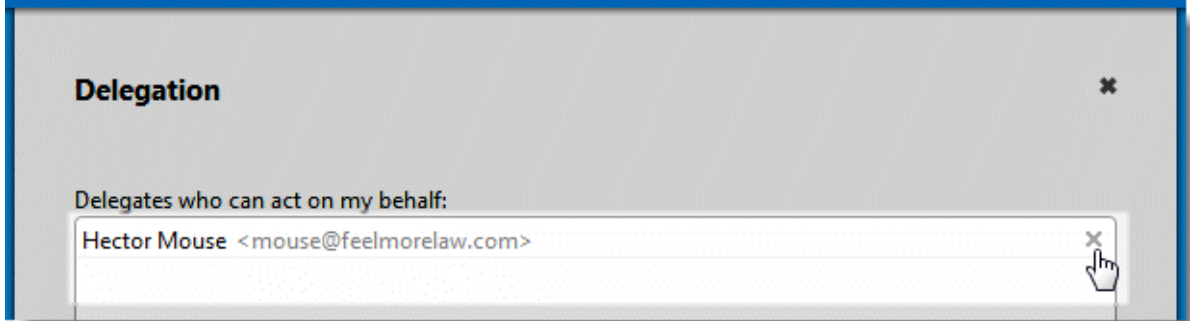
1. In Kerio Connect client, click your name and select **Settings**.
2. Go to section **Delegation**.
3. In the **Delegates who can act on my behalf** box, type the name or email address of a user. Kerio Connect client will offer users as you type → select a delegate.
4. Save the settings.



You can delegate as many users as you wish.

### Removing delegation

If you want to remove delegation rights from a user, click the x sign next to a delegate's name.



### Accepting delegation

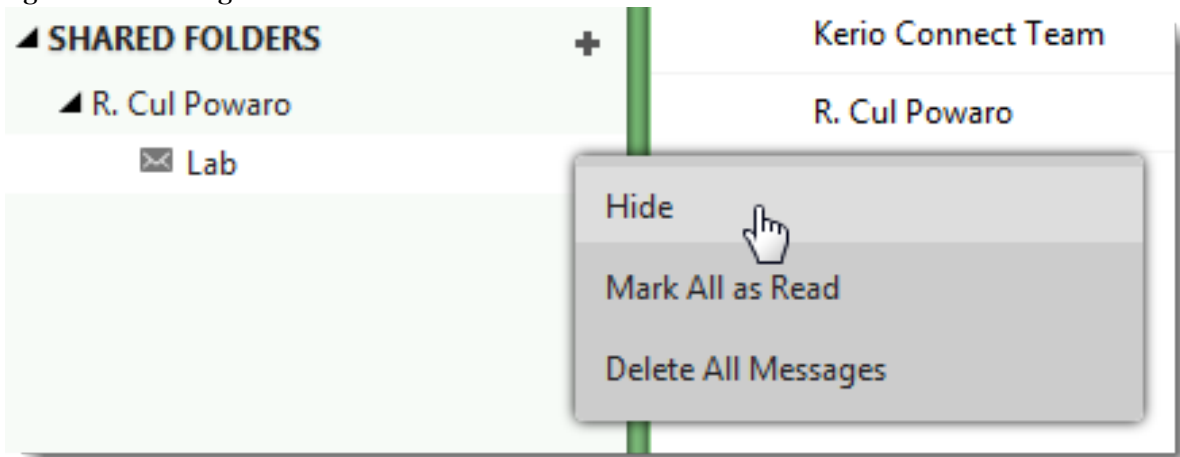
When somebody delegates you to act on their behalf, you automatically become a **delegate**.

Kerio Connect client will display the person's **Inbox** and **Calendar** (see section [Using delegation](#)).

You cannot reject delegation, however you can hide the delegated folders:

### Hiding a delegated Inbox

Right-click a delegated Inbox and select **Hide**.



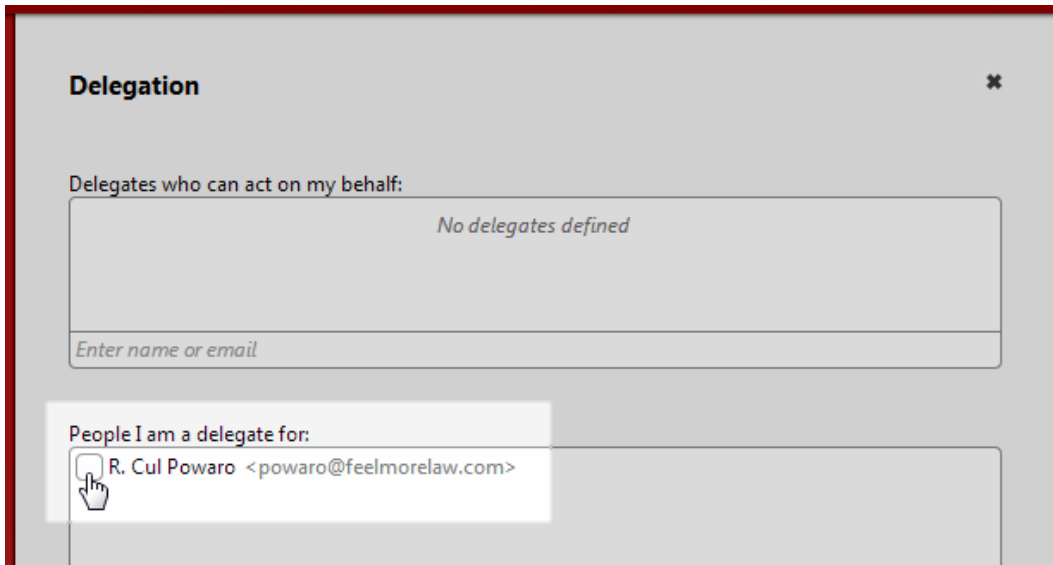
You are still a delegate, i.e. you can send messages on the person's behalf, but you cannot see their Inbox.

## Using delegation in Kerio Connect client

---

### *Hiding all delegated folders*

1. In Kerio Connect client, click your name and select **Settings**.
2. Go to section **Delegation**.
3. In the **People I am a delegate for** box, uncheck the appropriate box.



4. Save the settings.

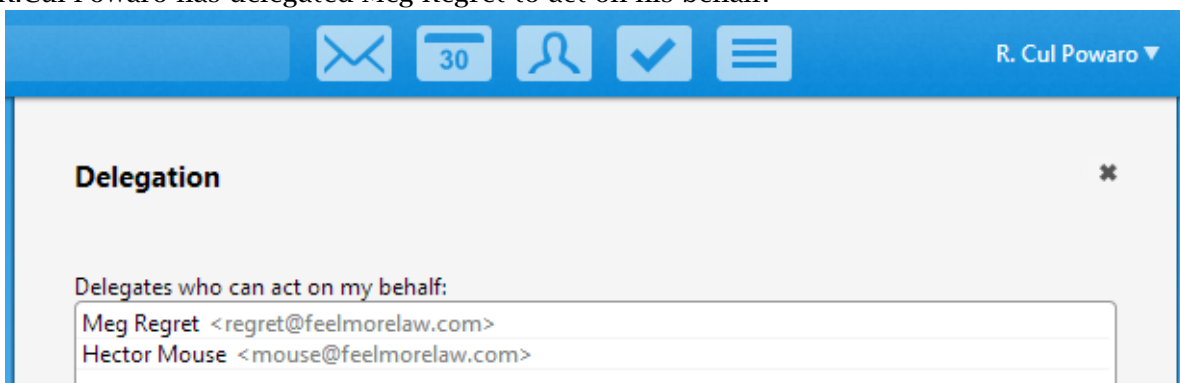
You cannot send messages and create/accept events on another person's behalf.

Check this box again to renew your delegation rights.

### Using delegation

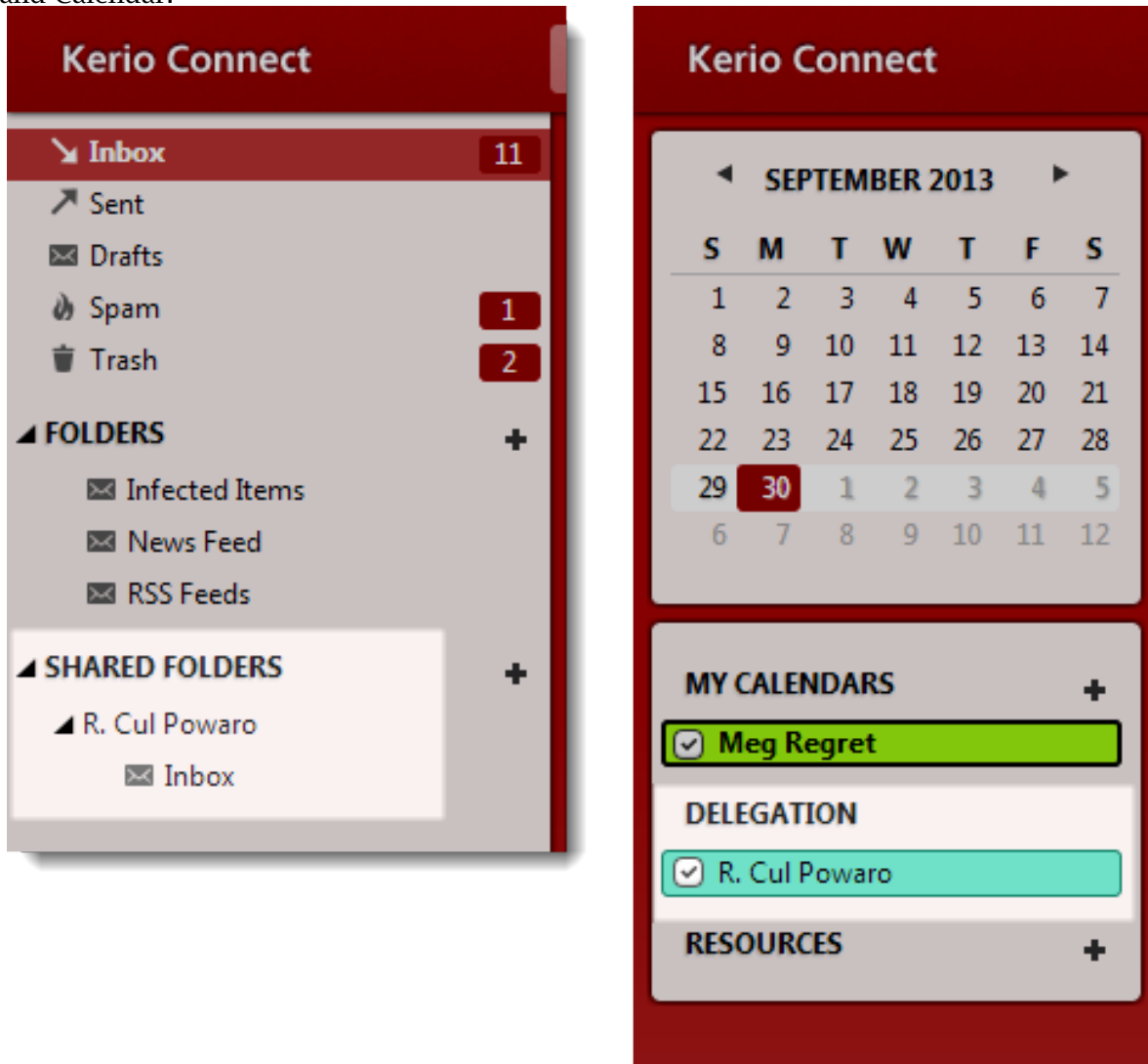
See the following examples on how to use delegation in Kerio Connect.

R.Cul Powaro has delegated Meg Regret to act on his behalf.





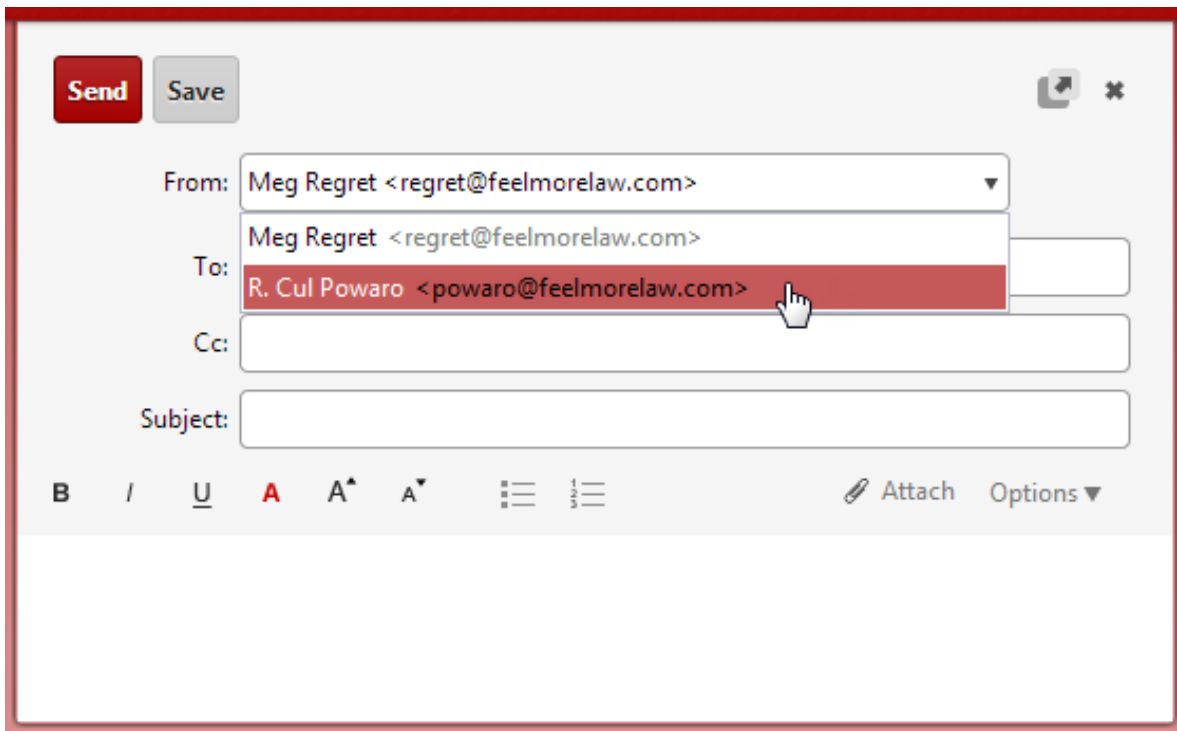
Meg automatically become delegates and her Kerio Connect client displays Mr. Powaro's Inbox and Calendar.



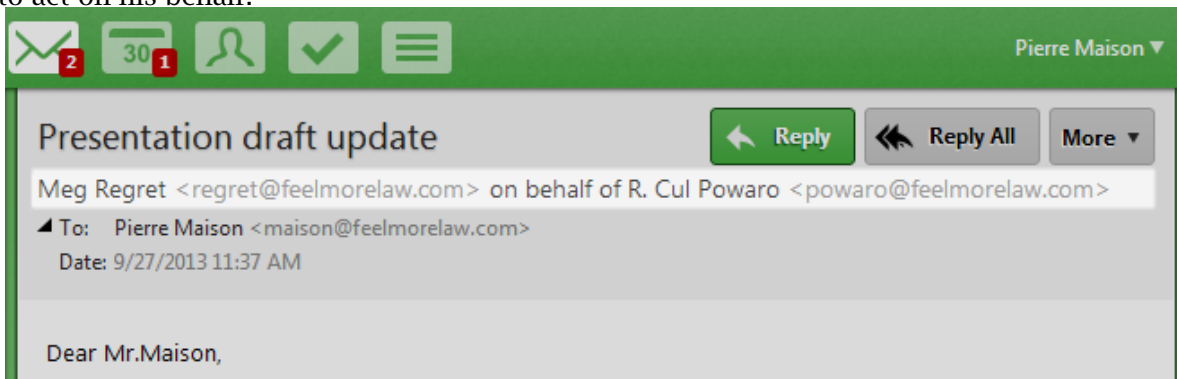
### Sending and receiving emails

Meg Regret wants to send a message on behalf of Mr. Powaro. She selects Mr. Powaro's address from the drop-down menu when composing a message.

## Using delegation in Kerio Connect client



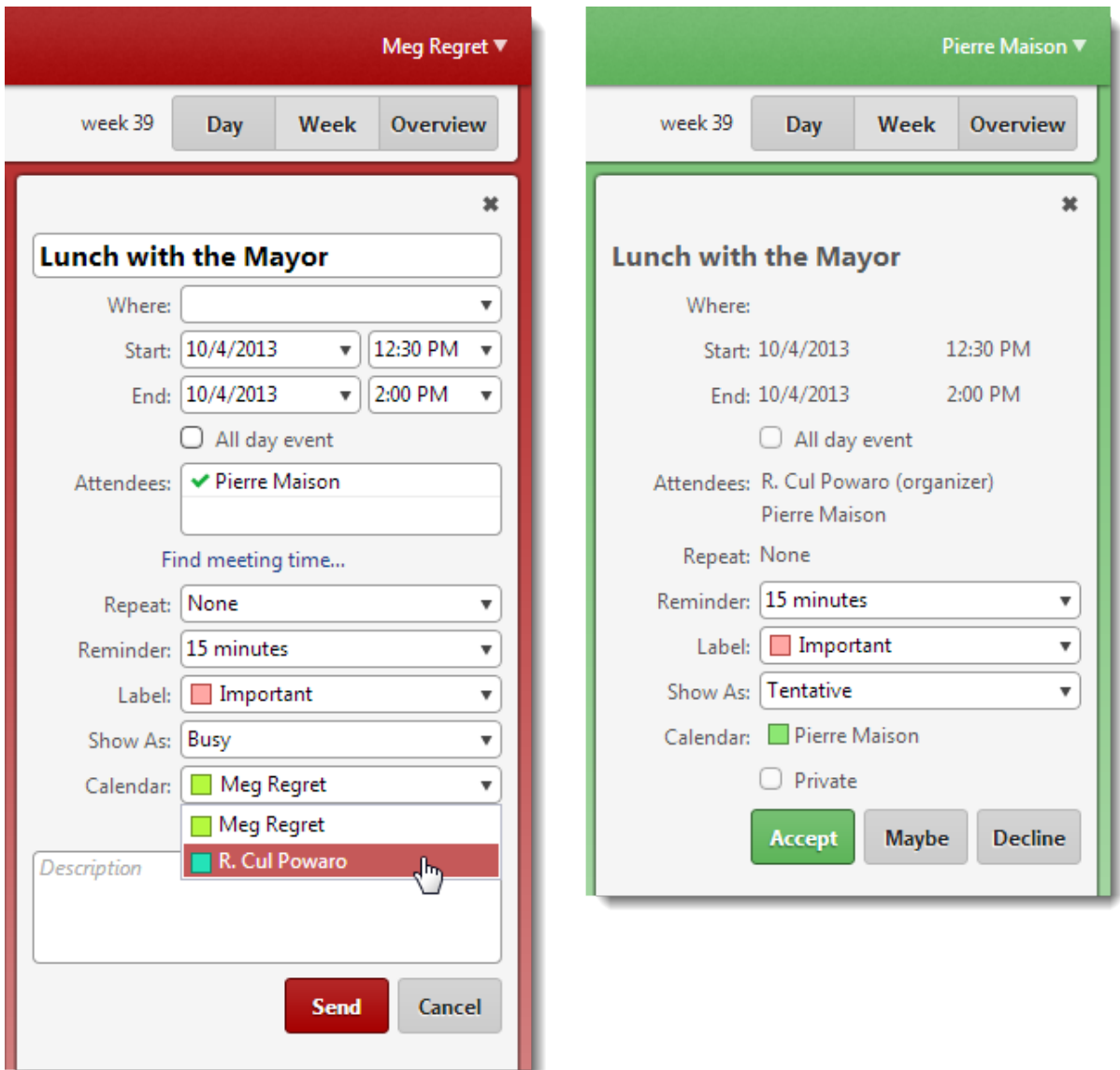
When Mr. Maison receives the message, he can see that Mr. Powaro has delegated Meg Regret to act on his behalf.



### Creating and accepting calendar events

Meg Regret wants to create an event on behalf of Mr. Powaro. She selects Mr. Powaro's calendar from the drop-down menu when creating an event.

When Mr. Maison receives the invitation, he can see it was sent by Mr. Powaro.



Mr. Maison invites Mr. Powaro to a meeting. Meg Regret sees the invitation sent to Mr. Powaro and can accept it on Mr. Powaro's behalf.

The screenshot displays the Kerio Connect client interface. On the left, there are three sections: 'MY CALENDARS' with a plus sign and a checked checkbox for 'Meg Regret'; 'DELEGATION' with checkboxes for 'Hector Mouse' (unchecked) and 'R. Cul Powaro' (checked); and 'RESOURCES' with a plus sign. Below these is a 'MEETINGS' section with a red notification badge containing the number '1'. The meeting listed is 'Quarterly review' with a star icon, sent to 'R. Cul Powaro' on 'October 06 10:00 AM' from 'Pierre Maison'. At the bottom of the meeting card are 'Accept' and 'Decline' buttons. On the right, a calendar grid shows a teal event titled 'Quarterly review' scheduled for 10:00 AM to 11:00 AM.



A delegate cannot create private events on another person's behalf. Nor can they see/edit the person's other private events.

# Sharing in Kerio Connect client

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## About sharing

In Kerio Connect client you can share any folder in any section with other users.

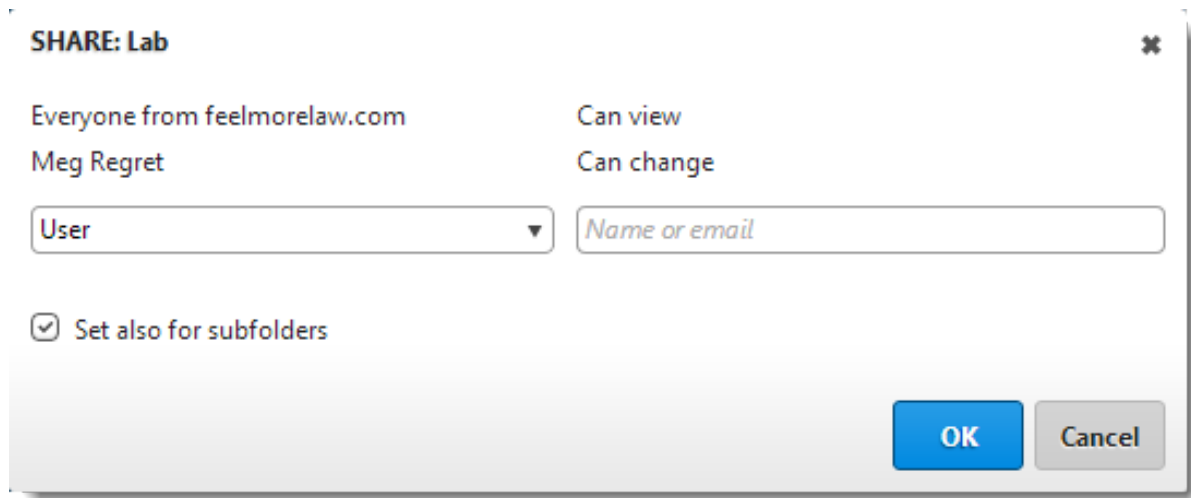
First, you assign sharing rights to used. Second, users subscribe to shared folders.

## Sharing email folders

1. In your email section in Kerio Connect client, right-click a folders and select **Sharing**.
2. Select with whom to share:
  - user — type a name or email address (Kerio Connect client will offer a list of users)
  - group of users — select from a list of groups
  - everyone from your domain
  - everyone from server — only available if [public folders](#) are set as **Global for all domains**
3. Select the level of rights:
  - can view — users cannot edit messages
  - can change — users can edit messages
  - is owner — users can edit messages and change sharing rights
4. You can **Set the rights also for subfolders**.  
Any subfolders create after you set sharing will not be included.
5. Save the settings.

## Sharing in Kerio Connect client

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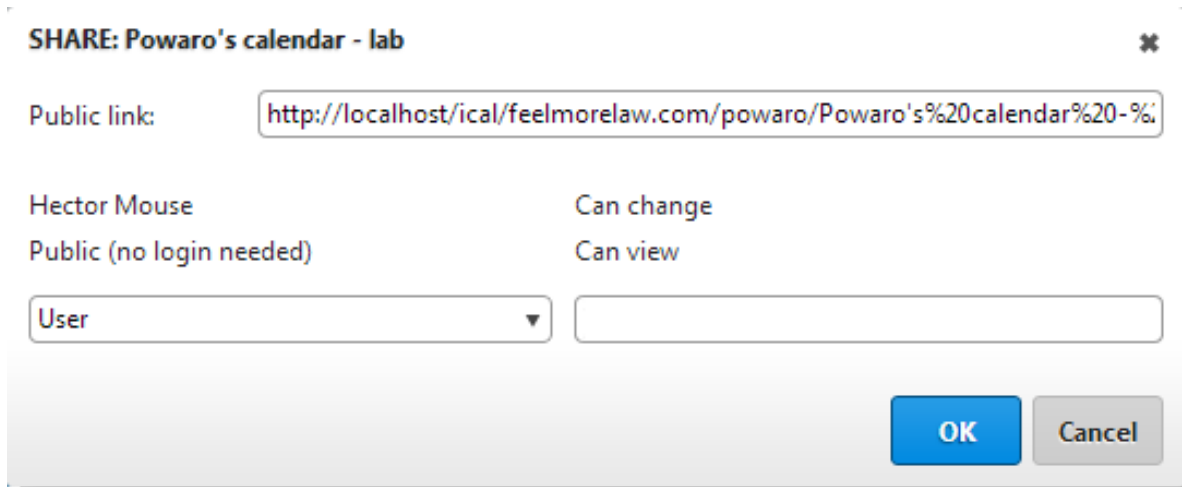


## Sharing calendars

1. In your calendar section in Kerio Connect client, right-click a calendar and select **Sharing**.
2. Select with whom to share:
  - user — type a name or email address (Kerio Connect client will offer a list of users)
  - group of users — select from a list of groups
  - everyone from your domain
  - public — no login required for displaying the calendar
3. Select the level of rights:
  - can view — users cannot edit events
  - can change — users can edit events
  - is owner — users can edit events and change sharing rights

If you share your calendar publicly, Kerio Connect client assigns the **can view** rights (these settings cannot be changed).

4. Save the settings.



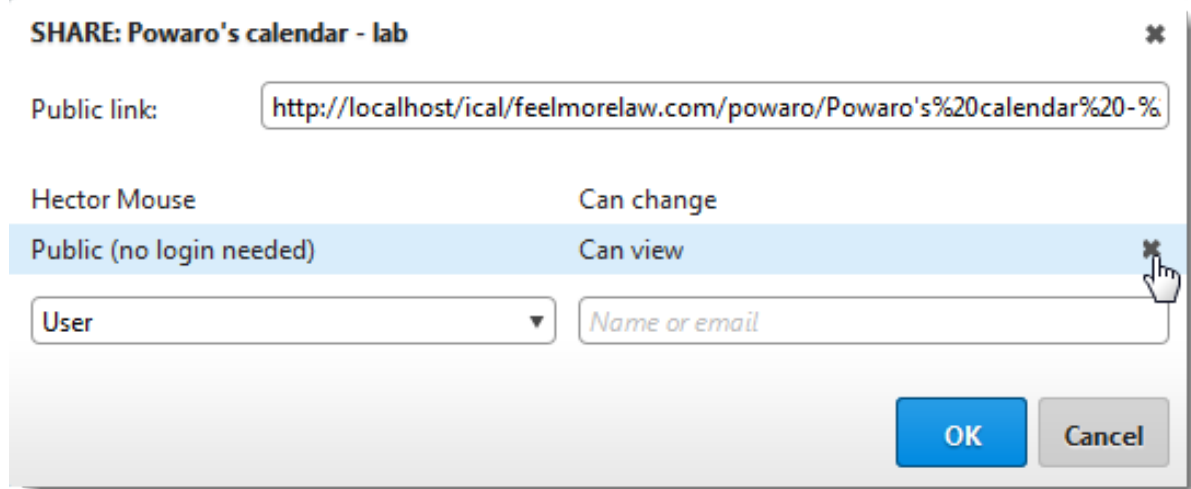
## Sharing contacts, notes and task folders

1. In your calendars/notes/tasks section in Kerio Connect client, right-click a folders and select **Sharing**.
2. Select with whom to share:
  - user — type a name or email address (Kerio Connect client will offer a list of users)
  - group of users — select from a list of groups
  - everyone from your domain
3. Select the level of rights:
  - can view — users cannot edit contacts/notes/tasks
  - can change — users can edit contacts/notes/tasks
  - is owner — users can edit contacts/notes/tasks and change sharing rights
4. Save the settings.

## Removing sharing rights

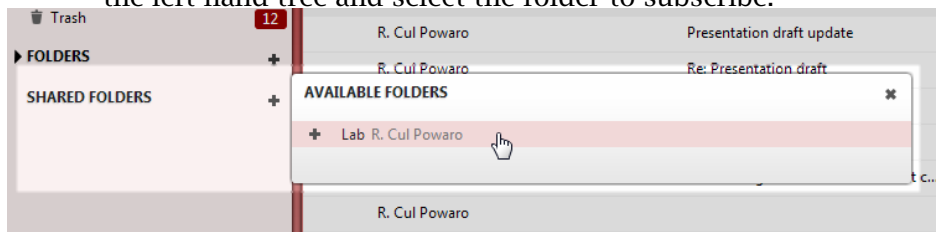
Go to the sharing dialog of a folder and click the x sign next to the user you wish to remove from sharing.

## Sharing in Kerio Connect client

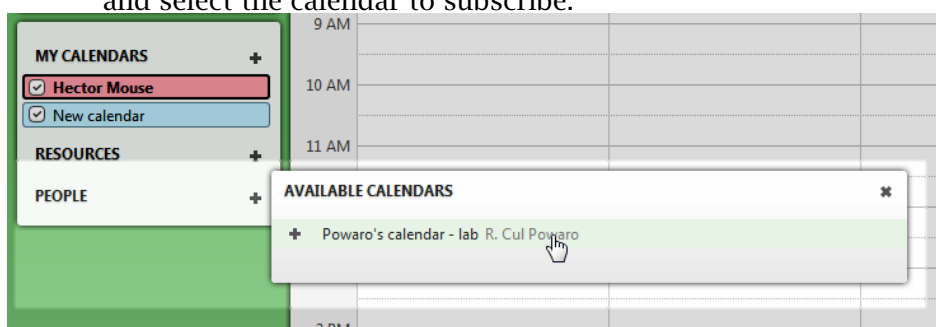


## Subscribe to shared folders

- email, calendar, note and task folders — click the plus sign next to **Shared Folders** in the left hand tree and select the folder to subscribe.



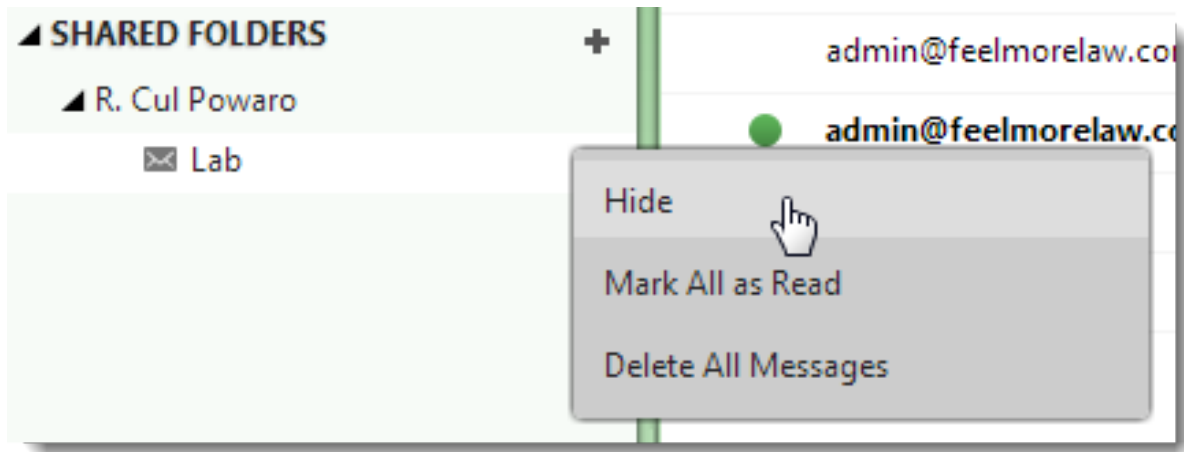
- calendar folders — click the plus sign next to **People** in the calendar list on the left and select the calendar to subscribe.



## Unsubscribing shared folders

Right-click a shared folder and select **Hide**.





# Synchronizing folders with mobile devices

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## Overview



New In Kerio Connect 8.2!

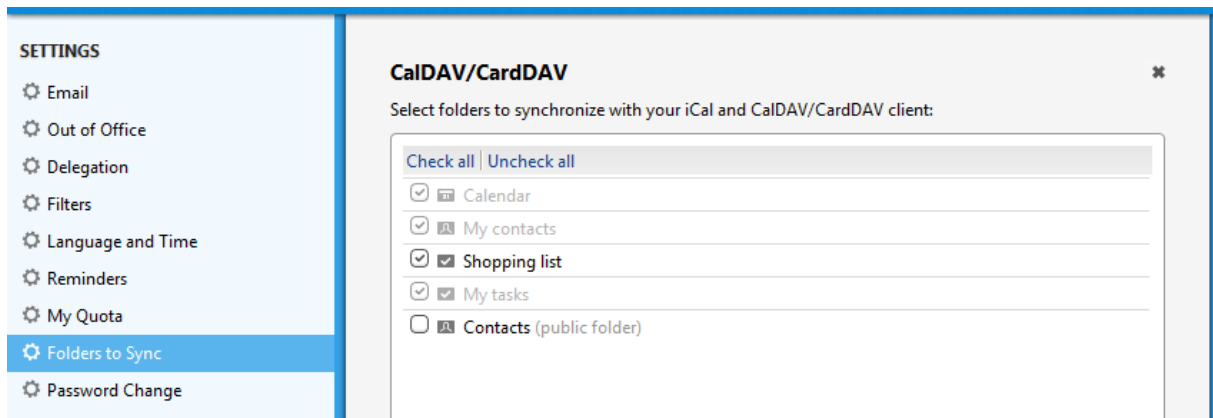
## Selecting folders to synchronize

In Kerio Connect client, you can select which folders will synchronize to your iCal/CalDAV/CardDAV/Exchange ActiveSync clients.

1. Click your name in Kerio Connect client and select **Settings**.
2. Go to section **Folders to Sync**.
3. Select which folders will synchronize.

The icon will help you identify the type of each folder (emails, contacts, tasks, notes)

4. **Save**.



## Exchange ActiveSync

Select folders to synchronize with your Exchange ActiveSync client:

Check all | Uncheck all

~powaro@feelmorrelaw.com

- Inbox
- Calendar
- My contacts
- Trash
- Drafts
- Spam
- Lab
- Pathology department
- Sent
- Shopping list
- My tasks
- The case of stole toy

**PUBLIC FOLDERS**

- Contacts
- Resources

**SHARED FOLDERS - Hector Mouse**

- Press conferences

# Configuring clients for instant messaging

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## Recommended IM clients

Kerio instant messaging service is based on XMPP, an open technology for real-time communication.

Kerio Connect recommends the following instant messaging clients:

- [Pidgin](#) for Microsoft Windows
- [Psi](#) for Linux
- [Messages](#) (iChat) for Mac OS X

## Supported features

Kerio instant messaging service supports the following features:

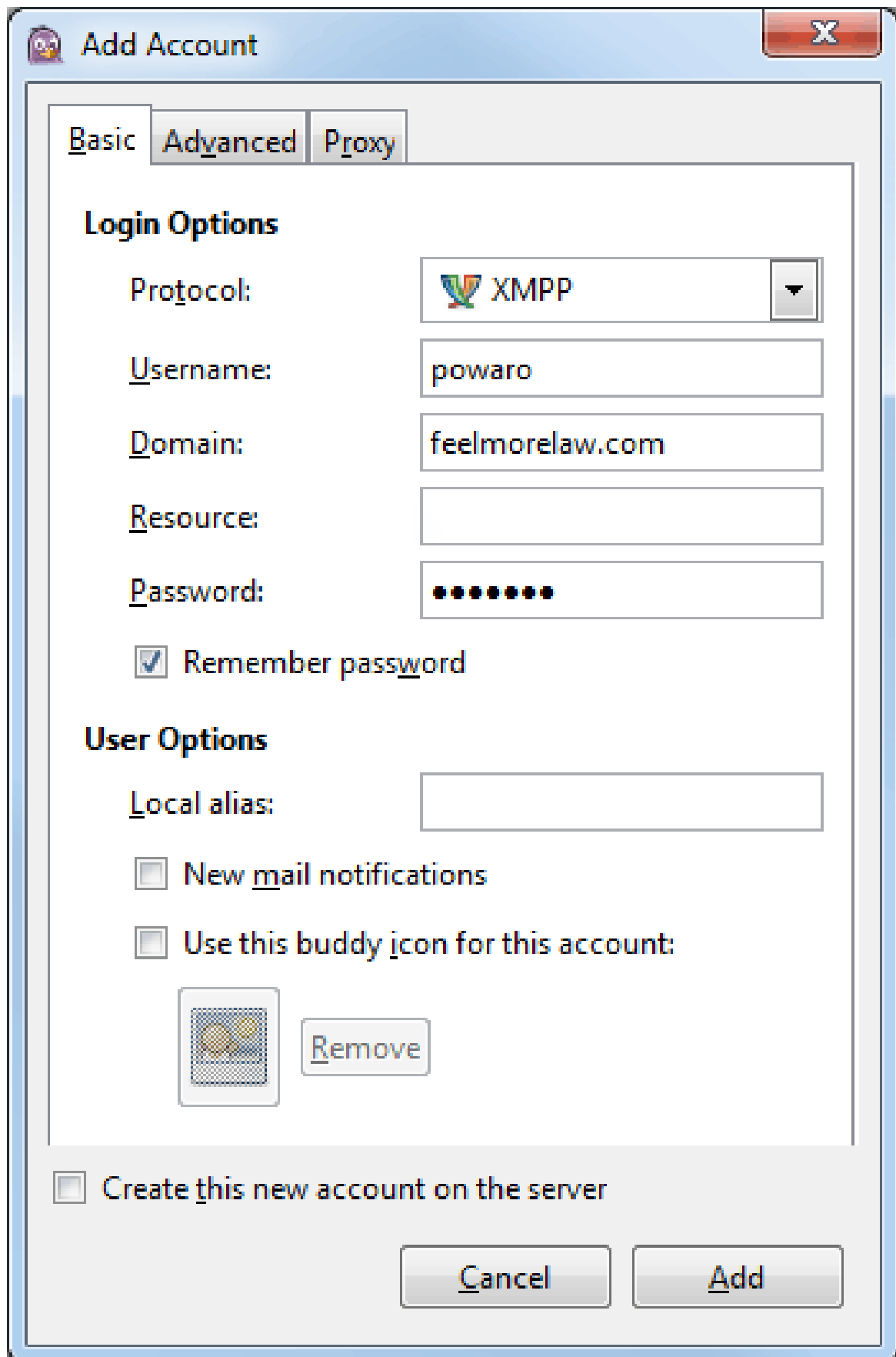
- sending rich text messages
- presence notifications
- sharing files
- auto-populated contact list of your colleagues
- synchronization of contact photos
- auto-configuration on Mac
- audio/video calls (availability depends on your [IM client](#))
- talking with multiple users in a single chat room (for more information on group chat, read article [Initiating group chat in instant messaging](#))

## Configuring Pidgin for Microsoft Windows

To configure the Pidgin client, follow these steps:

1. Download and install [Pidgin](#).
2. Run the application and click **Accounts** → **Manage Accounts** → **Add**.

3. Fill in the information — protocol (**XMPP**), your username and password, your domain.
4. Save the account.



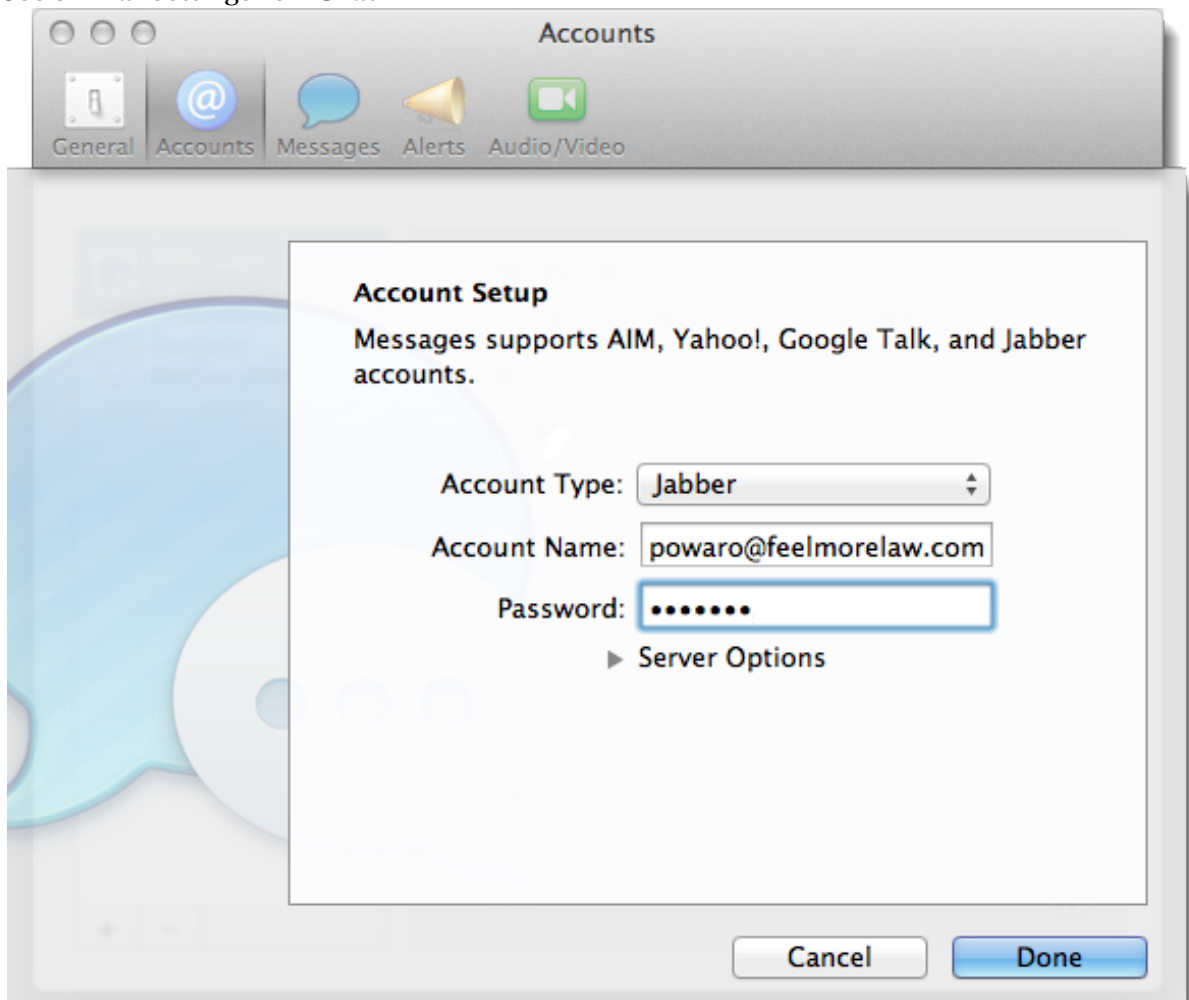
## Configuring Messages on Mac OS X

To auto-configure Messages on Mac OS X, use [Kerio Connect Account Assistant](#)

For manual configuration, follow these steps:

1. Go to Messages to **Preferences** → **Accounts**. and click the plus sign.
2. Fill in the information — protocol (**Jabber**), account name (you username including the domain) and password.
3. Save the account.

Use similar settings for iChat.



## Configuring Psi on Linux

1. Download and install [Psi](#).
2. Run the application and click **General** → **Account Setup** → **Add**.

## Configuring clients for instant messaging

---

3. Fill in the information — XMPP address (your username including the domain) and password.
4. Save the account.

Psi: Account Properties

Name: Default

Account Details Privacy Connection Misc.

**Account**

Jabber ID: powaro@feelmorrelaw.com  
Example: juliet@capulet.com

Password: \*\*\*\*\* [Change...](#)

**Settings**

- Automatically connect on startup
- Automatically connect after sleep
- Automatically reconnect if disconnected
- Log message history

[Cancel](#) [Save](#)

## Contact lists

When you login to your account in an IM client for the first time, a list of all your **Colleagues** will be created. You can move them into other folders or delete them (see section [Troubleshooting](#) on how to restore this contact list).

You can create additional contact lists and add other contacts depending on the client you use.



## Troubleshooting

### *Contact list*

If you have problems with your company contacts (**Colleagues**), ask your administrator to restore your contact list.



Any change you have previously made to the **Colleagues** list will be lost. Your external contacts will remain preserved.

### *Cannot connect to your account*

If you cannot connect to your account, check your [DNS settings for client auto-configuration](#) or configure the clients manually:

#### **Pidgin**

Go to **Modify Account** → **tab Advanced** and use one the following configurations:

- uncheck option **Require encryption**, add your server address and port 5222, or
- set Connection Security to **Use old-style SSL**, add your server address and port 5223

#### **Messages**

Go to **Account Settings** → **tab Server Settings** and use one the following configurations:

- uncheck option **Use SSL**, add your server address and port 5222, or
- check option **Use SSL**, add your server address and port 5223

#### **Psi**

Go to **Modify Account** → **tab Connection**, check option **Manually Specify Host/Port** and use one the following configurations:

- set Encryption Connection to **Always**, add your server address (Host) and port 5222, or
- set Encryption Connection to **Legacy SSL**, add your server address (Host) and port 5223

# Initiating group chat in instant messaging

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## About group chat in instant messaging



New in Kerio Connect 8.2!

If you use [instant messaging](#) in Kerio Connect and want to chat with multiple users and share thoughts with all of them together, you can create a temporary chat room, i.e. **group chat**.

Kerio Connect does not require any additional settings to use group chats.

The server address for group chats is `conference.[your_domain_name]` , for example `conference.feelmorelaw.com`.

This article describes group chat in:

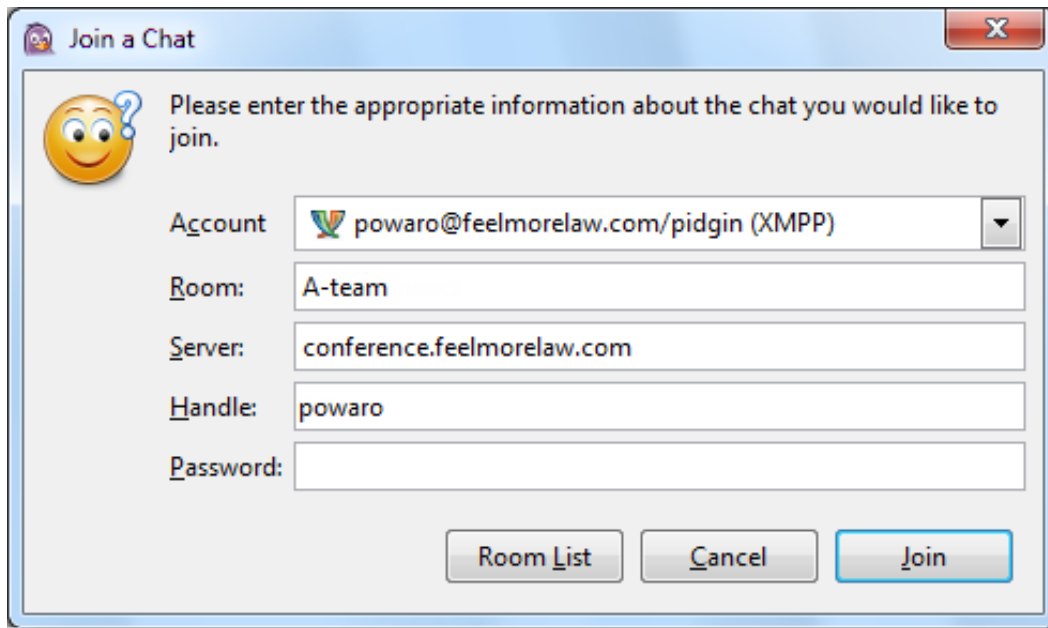
- [Pidgin for Microsoft Windows](#)
- [Messages for Mac OS X](#)
- [Psi for Linux](#)

For information on initial configuration of instant messaging clients, read article [Configuring clients for instant messaging](#).

## Pidgin for Microsoft Windows

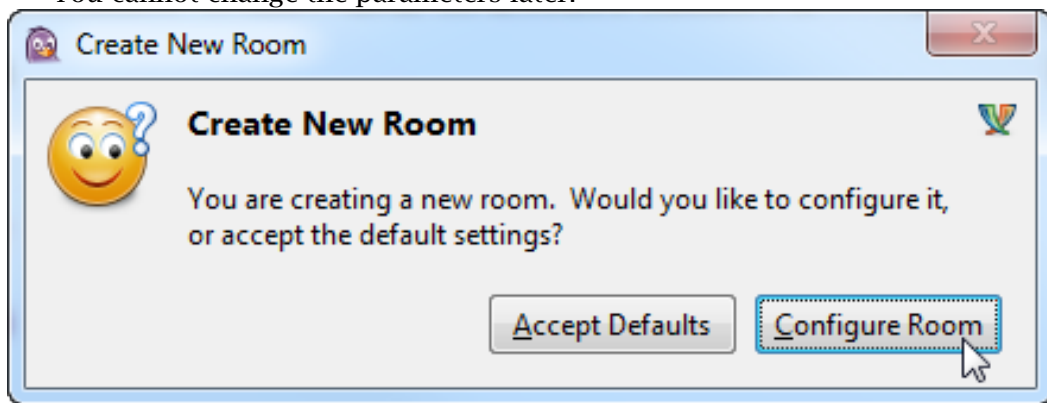
### Initiating group chat in Pidgin

1. In your Pidgin, click **Buddies** → **Join a Chat**.
2. Select account, type a room name, server, your nickname (**Handle**).



3. Click **Join**.
4. To configure the chat room (e.g. secure the room with a password), click **Configure Room** and set parameters.

You cannot change the parameters later.



5. Confirm the settings.

### Inviting people to group chat in Pidgin

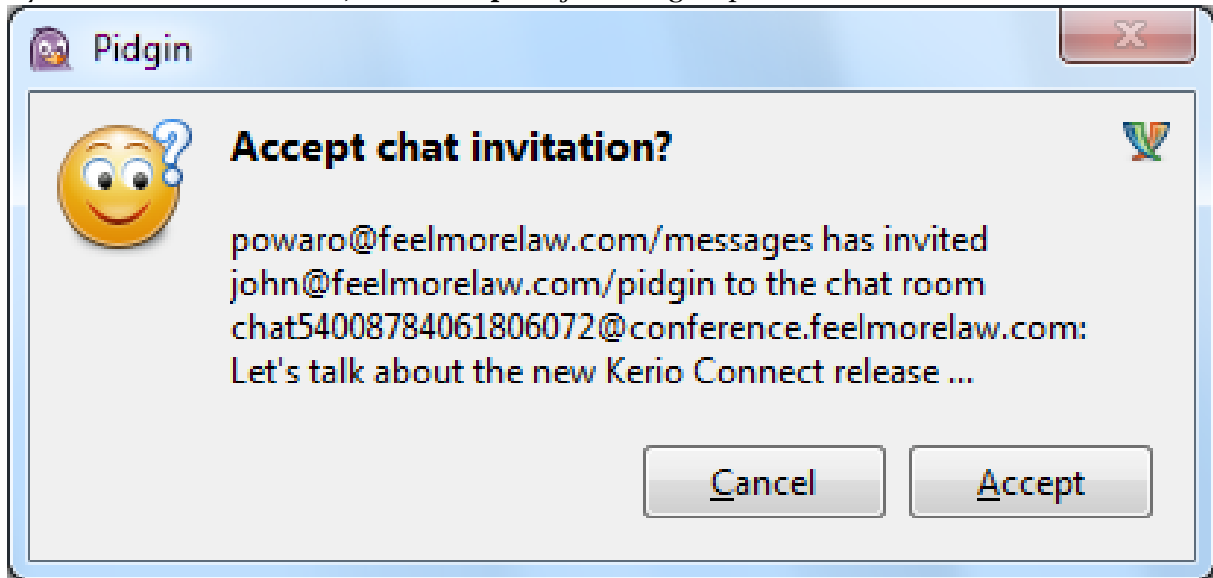
To invite people to a group chat, drag them from your contact list to the room list or click **Conversation** → **Invite**.

## Initiating group chat in instant messaging

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### Joining and leaving group chats in Pidgin

If you receive an invitation, click **Accept** to join the group chat.



You can also search through existing chat groups by clicking on **Buddies** → **Join a Chat** → **Room List** → **Find Rooms**.

To leave a room, close the chatroom window.

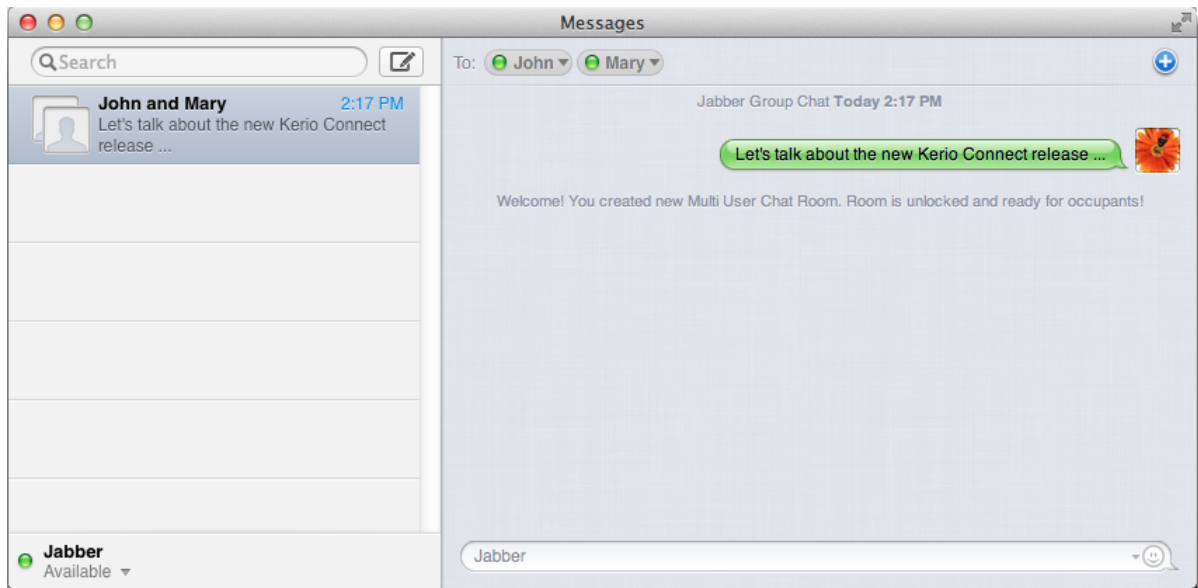
## Messages for Mac OS X

### Initiating group chats in Messages

To create a group chat, add at least two users to a conversation.

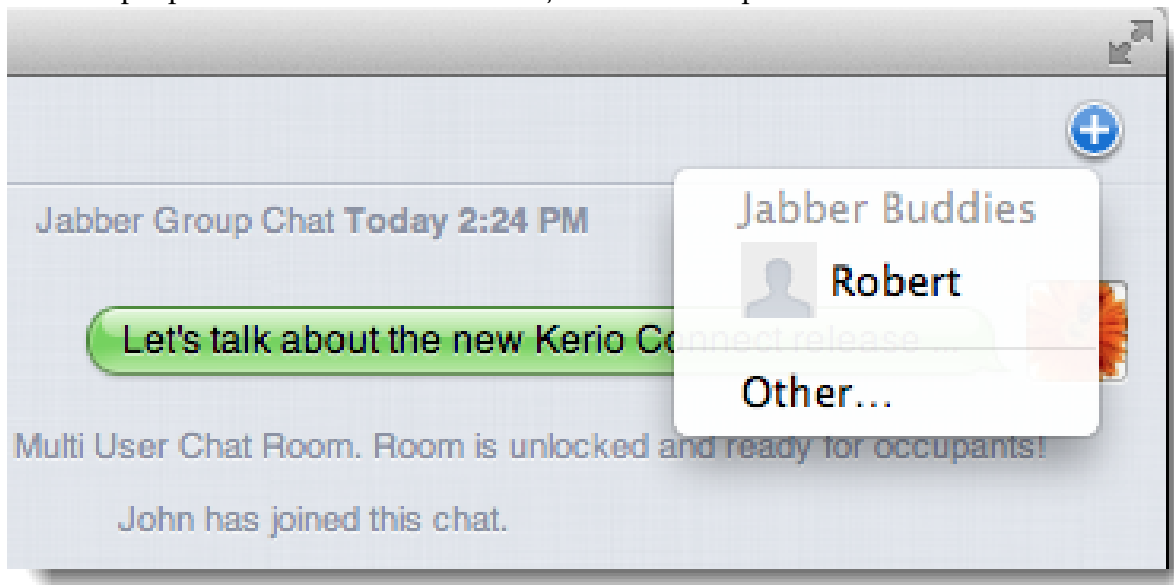
1. Initiate a conversation in **Messages**.
2. Add users to this conversation.

Users receive an invitation and you can start chatting.



### Inviting people to group chats in Pidgin

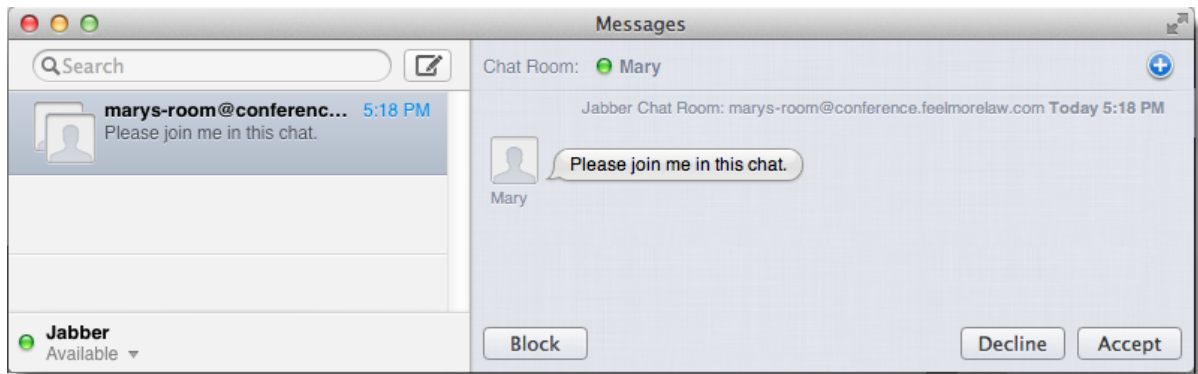
To invite people to a multi user chat room, click the blue plus icon and invite users.



### Joining and leaving group chats in Messages

To join a group chat, select it from the list of chats and click **Accept**.

## Initiating group chat in instant messaging



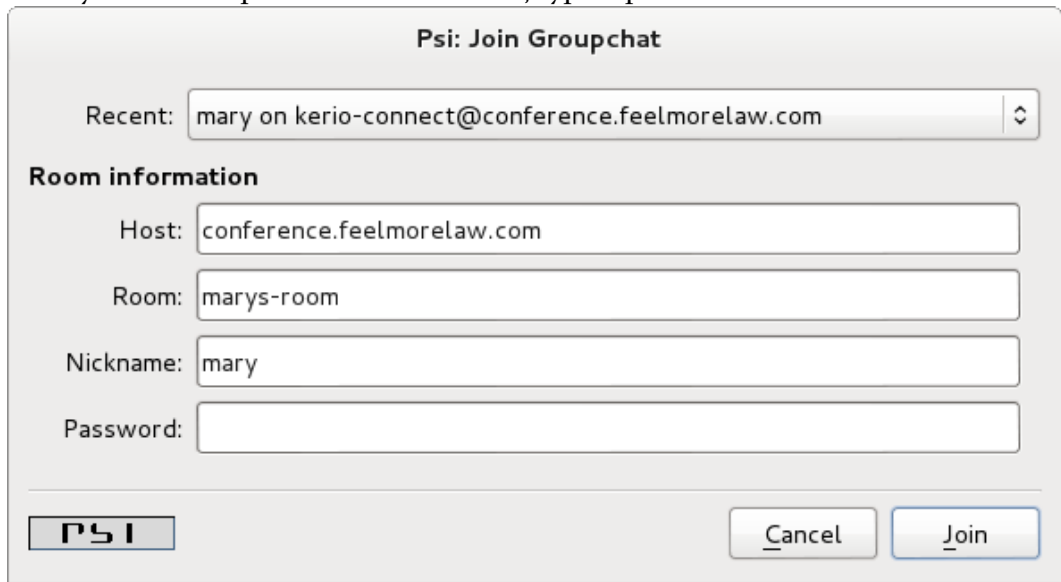
To leave a chat room, delete it from the list of chats.

## Psi for Linux

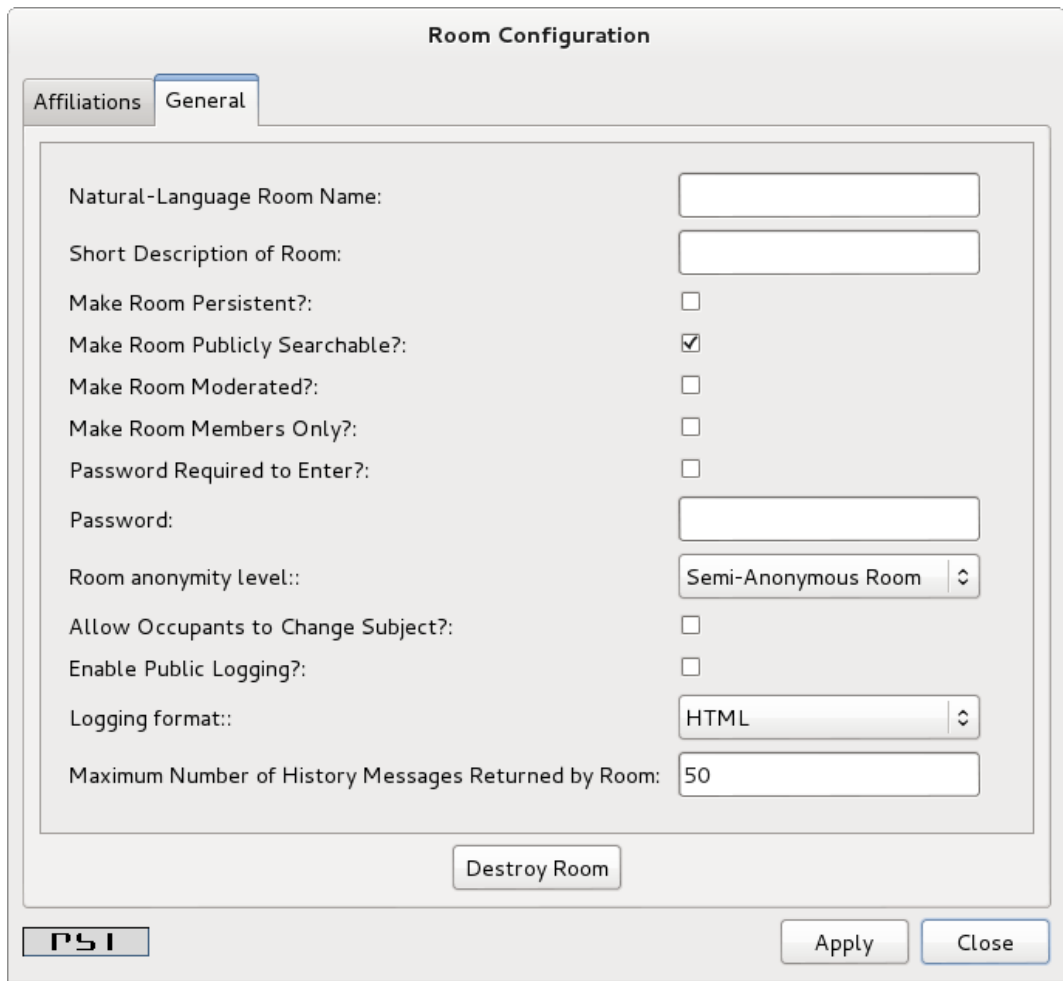
### Initiating group chat in Psi

1. In your Psi, click **General** → **Join Groupchat**.
2. Type a conference host, room name, server, your nickname.

If you want to protect the chat room, type a password.



3. Click **Join**.
4. To configure the chat room (e.g. secure the room with a password), click the down arrow above the user list and select **Configure Room**.



The image shows a "Room Configuration" dialog box with two tabs: "Affiliations" and "General". The "General" tab is active. The dialog contains the following fields and options:

- Natural-Language Room Name: [Text input field]
- Short Description of Room: [Text input field]
- Make Room Persistent?:
- Make Room Publicly Searchable?:
- Make Room Moderated?:
- Make Room Members Only?:
- Password Required to Enter?:
- Password: [Text input field]
- Room anonymity level:: [Dropdown menu showing "Semi-Anonymous Room"]
- Allow Occupants to Change Subject?:
- Enable Public Logging?:
- Logging format:: [Dropdown menu showing "HTML"]
- Maximum Number of History Messages Returned by Room: [Text input field containing "50"]

At the bottom of the dialog, there is a "Destroy Room" button. In the bottom-left corner of the Psi window, there is a "Psi" logo. In the bottom-right corner, there are "Apply" and "Close" buttons.

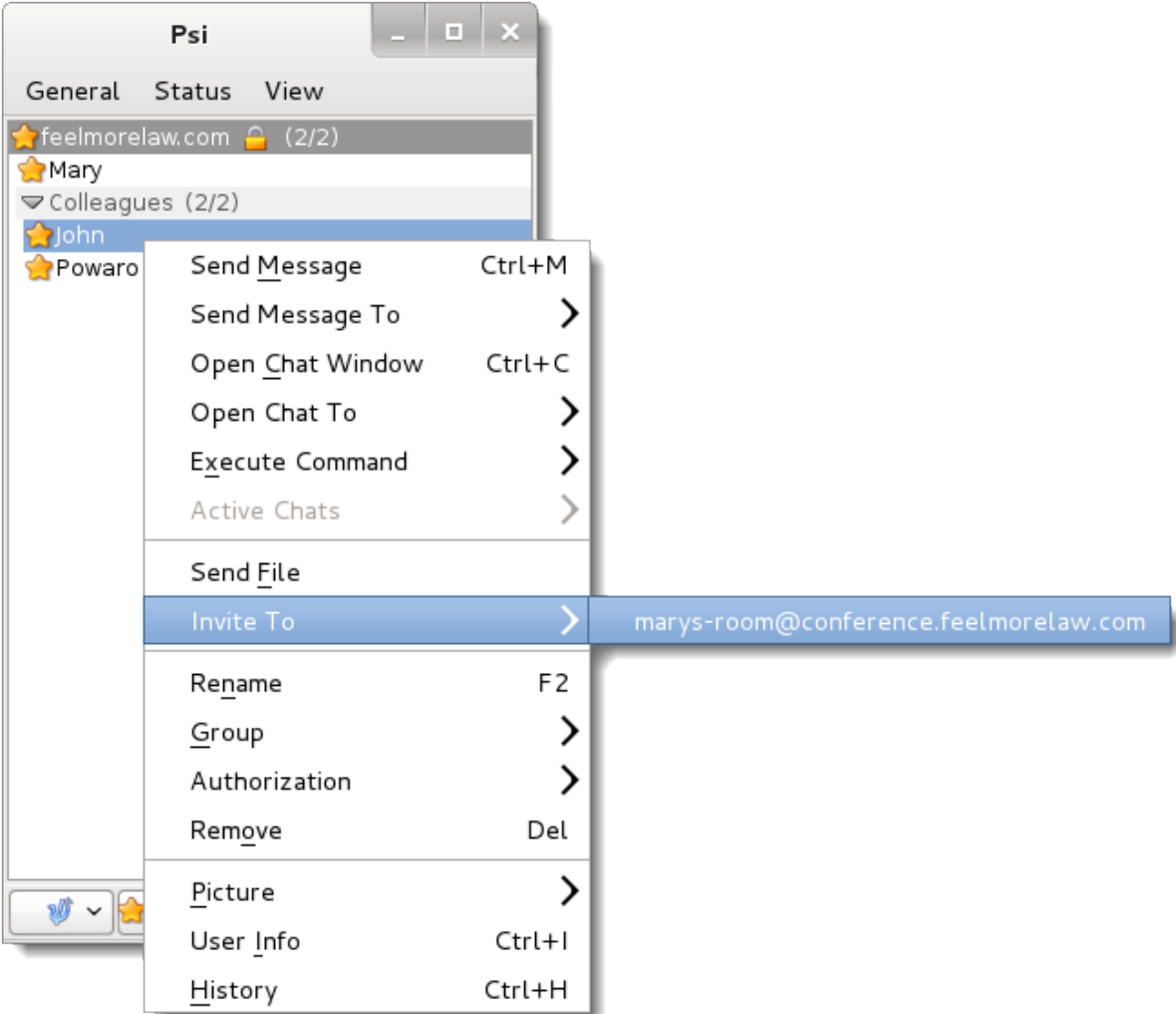
5. **Apply** the settings.

### Inviting people to group chat in Psi

To invite people to a group chat, select a person in your contact list and click **Invite To**.

**Initiating group chat in instant messaging**

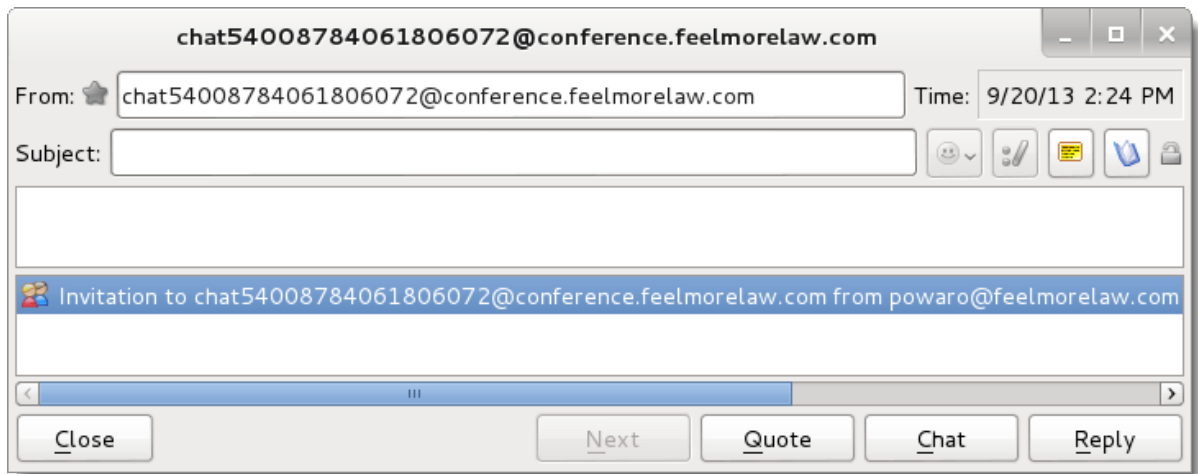
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**Joining and leaving group chats in Psi**

To accept an invitation to a group chat, double-click the invitation text inside the event dialog and click **Join**.





To leave a room, close the chatroom window.

# Kerio Connect Account Assistant

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## About Kerio Connect Account Assistant

**Kerio Connect Account Assistant** is a single autoconfig tool which enables one-time auto-configuration of the following applications on Mac OS 10.5 or newer:

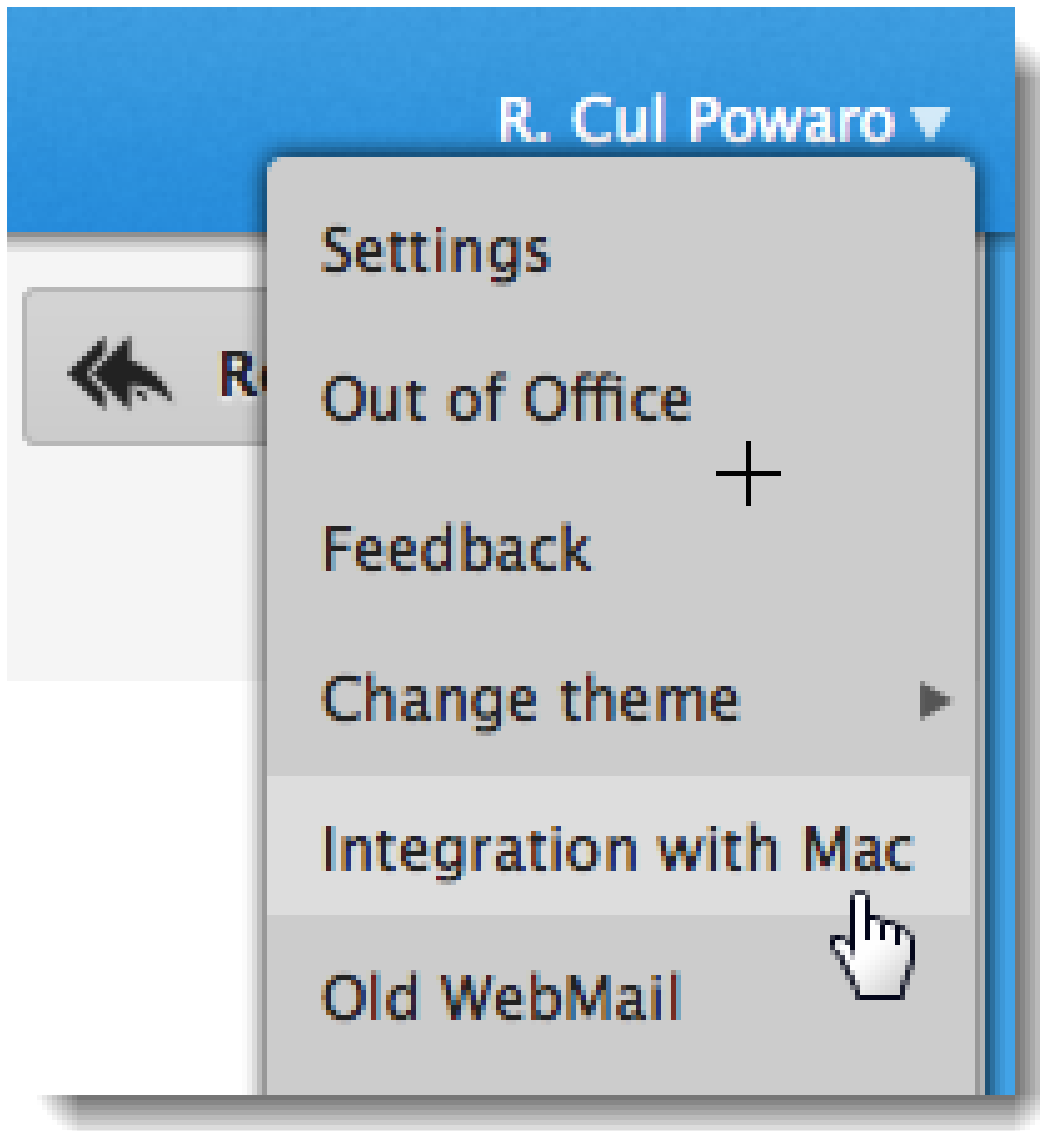
- Apple Mail
- Apple iCal
- Apple Address Book
- Microsoft Outlook
- Microsoft Entourage

## Using Kerio Connect Account Assistant

Kerio Connect Account Assistant is unique for each user. Therefore, it is necessary to download it from your own integration page.

1. Open the Mac OS X integration page (e.g. <http://mail.feelmorelaw.com/integration>).

You can also click your name in Kerio Connect client and select **Integration with Mac**.

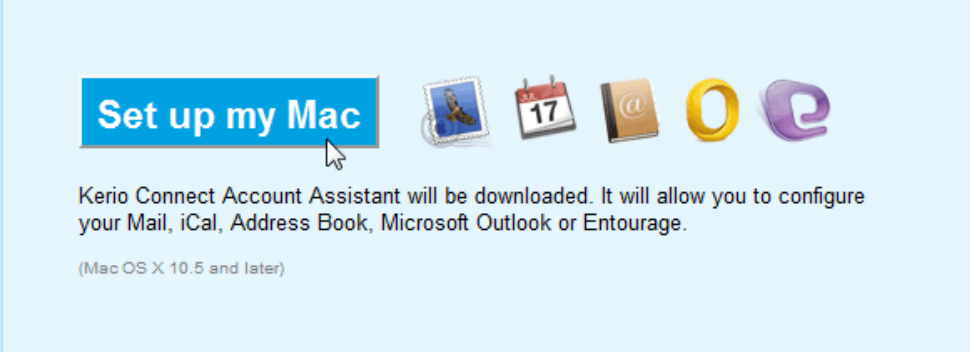


2. Click on **Set up my Mac** and download Kerio Connect Account Assistant to your computer.

### Integration with Mac

[Windows](#) | [Linux](#)

Connect your Mac to Kerio Connect:



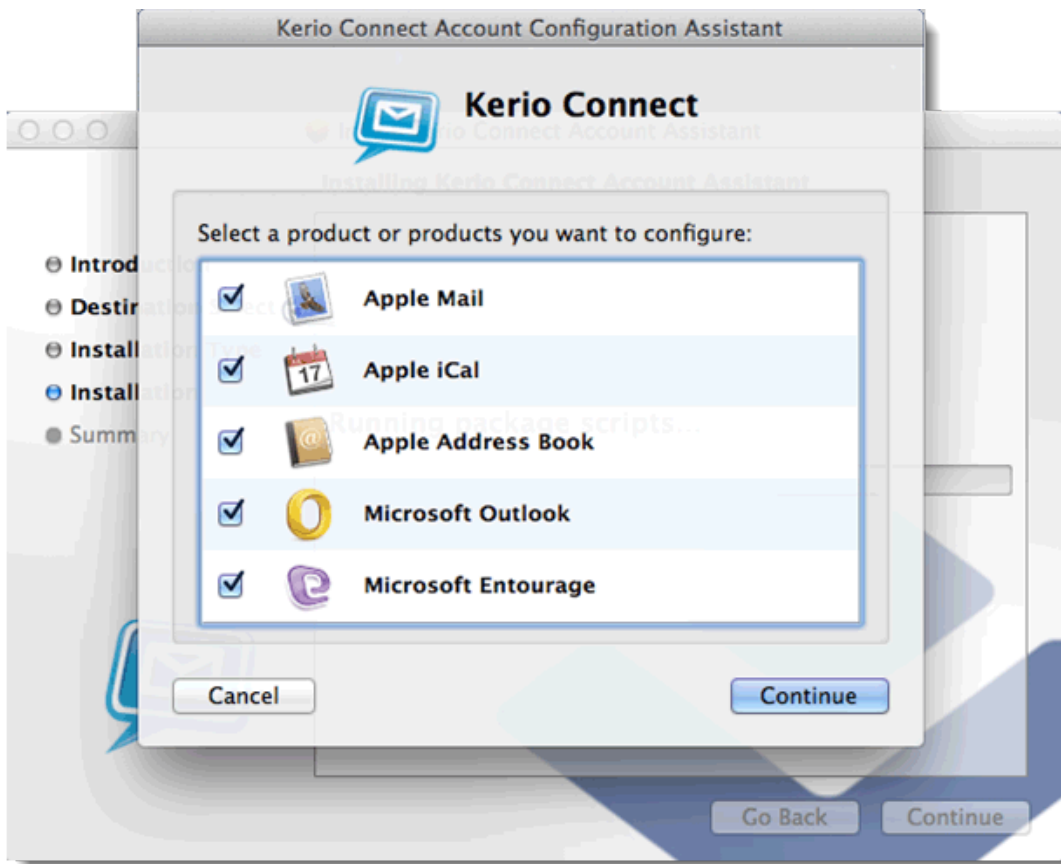
**Set up my Mac**

Kerio Connect Account Assistant will be downloaded. It will allow you to configure your Mail, iCal, Address Book, Microsoft Outlook or Entourage.

(Mac OS X 10.5 and later)

[See other options](#)

3. Once the download finishes, the installation program gets started — confirm installation and run it.
4. Select which products installed on your computer to configure (you can configure any of them later) and **Continue**.



5. Enter your Kerio Connect user account password and **Continue**.

Now the configuration application verifies your identity and server connection.

6. Click on **Configure** to run configuration of the selected applications.

Now the configured applications are available and ready.



All previous configuration modules are available at the integration page, upon clicking on *See other options*.

# Support for Apple iCal/Calendar using the CalDAV standard

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## About CalDAV and Apple iCal/Calendar

CalDAV is an Internet standard which allows applications such as Apple iCal and Apple Calendar to manage calendaring information on a remote server (Kerio Connect).

Kerio Connect supports the following CalDAV features:

- calendar availability (free/busy information)
- events with privacy tag
- scheduling (invitation requests)



New in Kerio Connect 8.2!

- per-folder sharing (without delegation)
- folder sharing notifications
- full delegation support
- custom labels for shared calendars

## Configuring CalDAV account

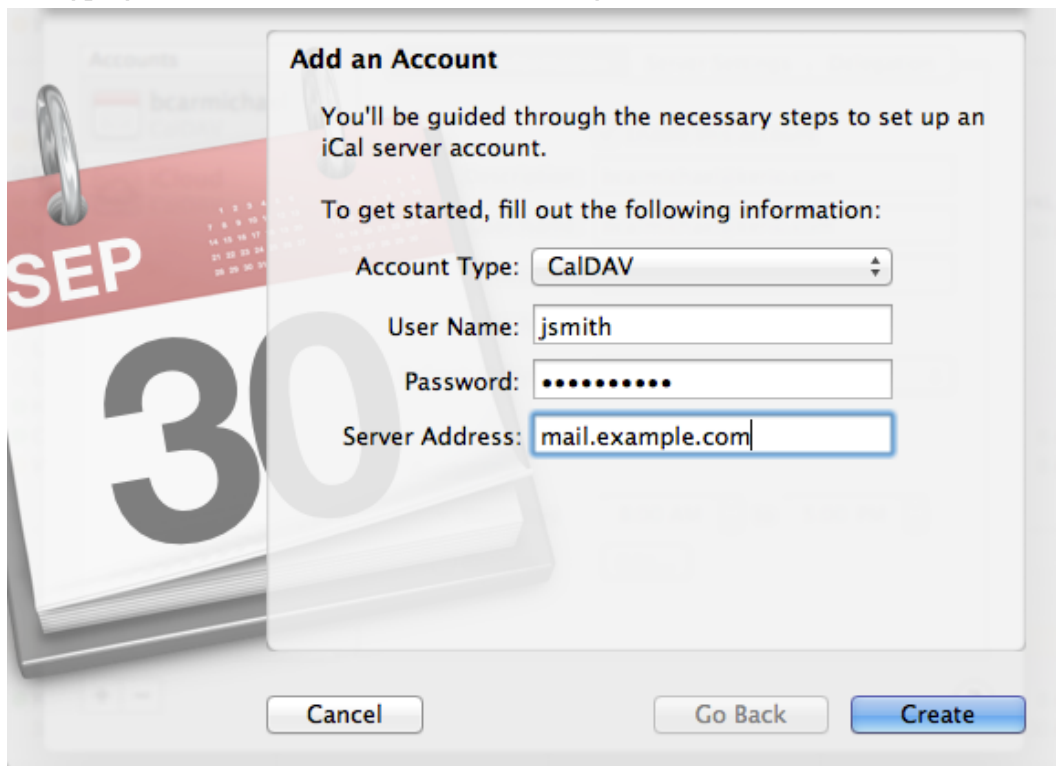
### *Automatic configuration*

Use [Kerio Connect Account Assistant](#) to automatically configure Apple iCal/Calendar accounts on Mac OS X 10.5 or later.

### *Manual configuration*

1. Run the *Apple iCal/Calendar* application.
2. In the menu, select **iCal/Calendar**→ **Preferences** and go to tab **Accounts**.
3. Click on the + button to create a new account.

4. Type your credentials and the location of your Kerio Connect server.



5. Confirm.

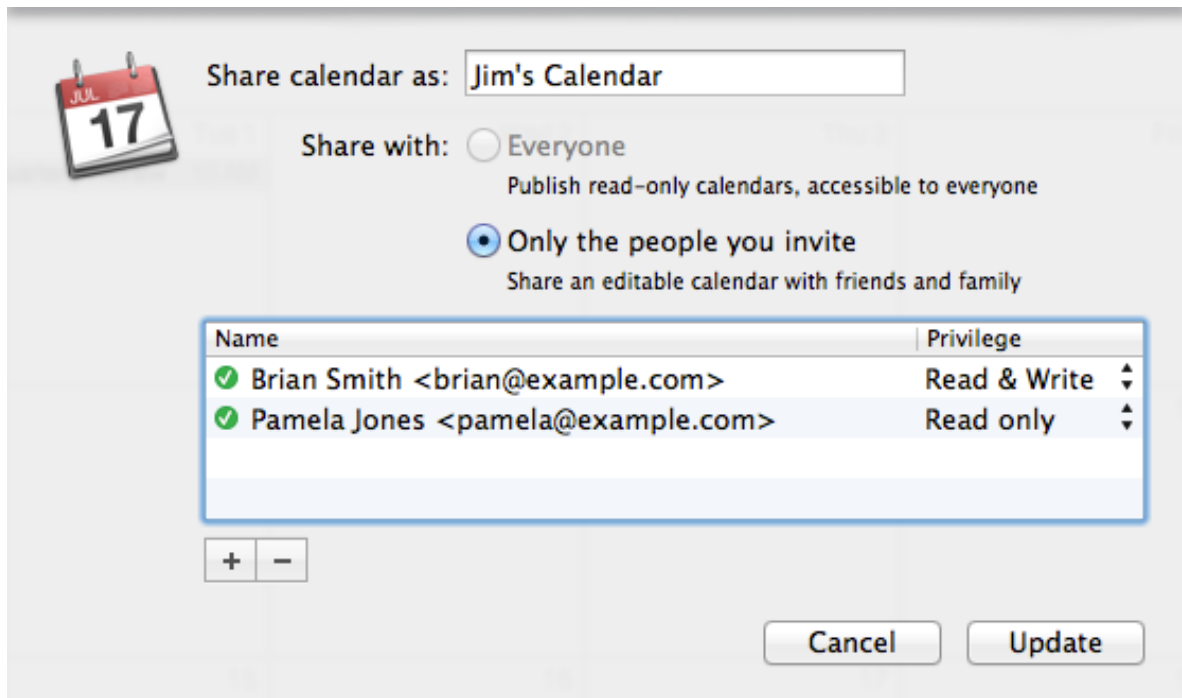
## Sharing calendars

If you configure Apple iCal/Calendar with CalDAV, you can share individual calendars with other users.

You can also use an advanced type of sharing — delegation. A delegate has full control over your calendar and can also create and accept meeting invitations on your behalf.

To share a calendar:

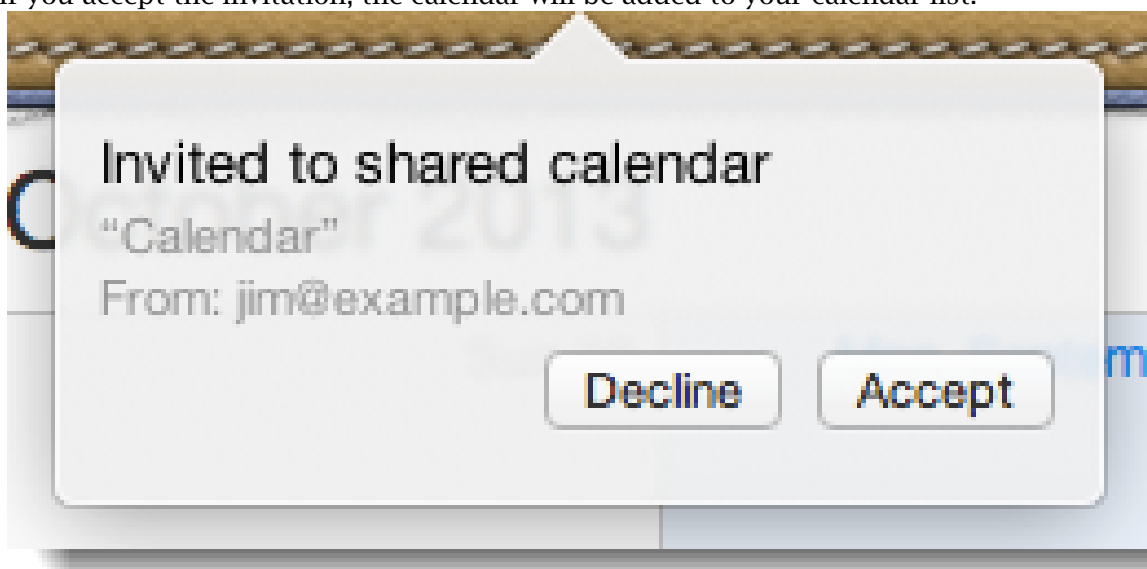
1. Select a calendar you want to share from the list of your calendars.
2. In the menu, select **Calendar** → **Share Calendar** (**Edit** → **Share Calendar** on 10.8 and above).
3. Click the + button to add users.
4. In the **Privilege** column, assign rights — **Read only** or **Read & Write**.



### *Adding shared, public or resource calendar*

Users assigned sharing rights receives a notification which invites them to join the shared calendar.

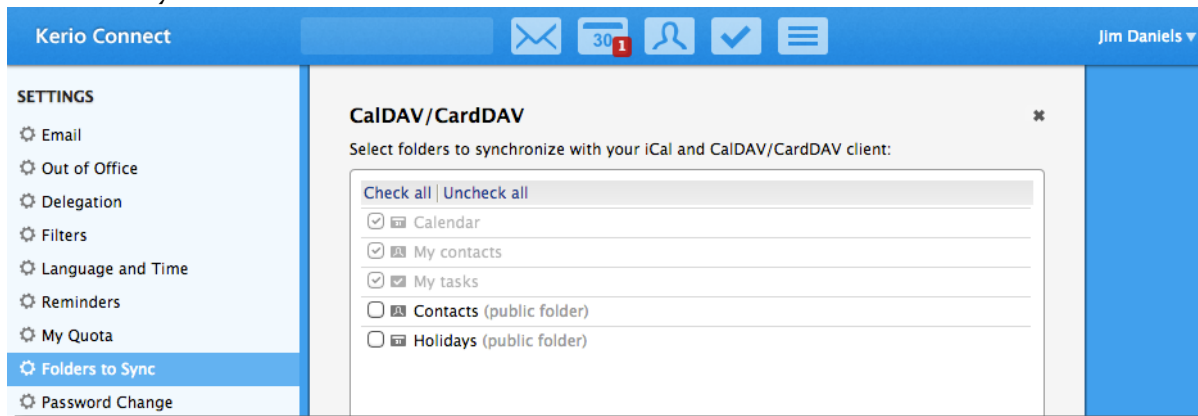
If you accept the invitation, the calendar will be added to your calendar list.



It is possible to add other calendars (e.g. public calendars or resources). This is necessary if the initial invitation was either declined, or never received. Adding or removing calendars



for synchronization can be configured in the settings of the Kerio Connect client in section **Folders to Sync**.



## Assigning delegates

You can also use an advanced type of sharing — delegation. A delegate has full control over your calendar and can also create and accept meeting invitations on your behalf.

Delegates are assigned in the account settings, under the **Delegation** tab. Choose the **Edit** button to add a delegate.

## Upgrading to Kerio Connect 8.2

Due to the changes in calendar sharing in Kerio Connect 8.2, users with currently delegated calendars in Apple iCal/Calendar will need to restart their computer. After re-launching Apple iCal/Calendar, the user will receive an invitation to join each shared calendar that was previously added using the delegation feature.

# Configuring Microsoft Windows 8 Mail using Exchange ActiveSync

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## Overview

Kerio Connect 8.1 and above supports the ability to synchronize mail, contacts, and calendars to the Microsoft Windows 8 operating system via the Exchange ActiveSync protocol.



Beginning May 1, 2013, the support of Exchange ActiveSync in Kerio Connect is available as an add-on. For detailed information, read the [Exchange ActiveSync FAQs](#).

## Configuring Kerio Connect

There is no additional configuration necessary to support Exchange ActiveSync (EAS) from Microsoft Windows 8.

Check the following items:

- Exchange ActiveSync add-on in Kerio Connect
- HTTPS service running and port 443 open on your firewall
- [SSL certificate](#) signed by a certification authority to simplify desktop configuration

## Installing SSL certificate on your desktop



Users need to install a certificate if Kerio Connect uses a [self-signed certificate](#).

1. Go to the Kerio Connect client login page and click **Integration with Windows**.
2. Click the **Download SSL certificate** link.



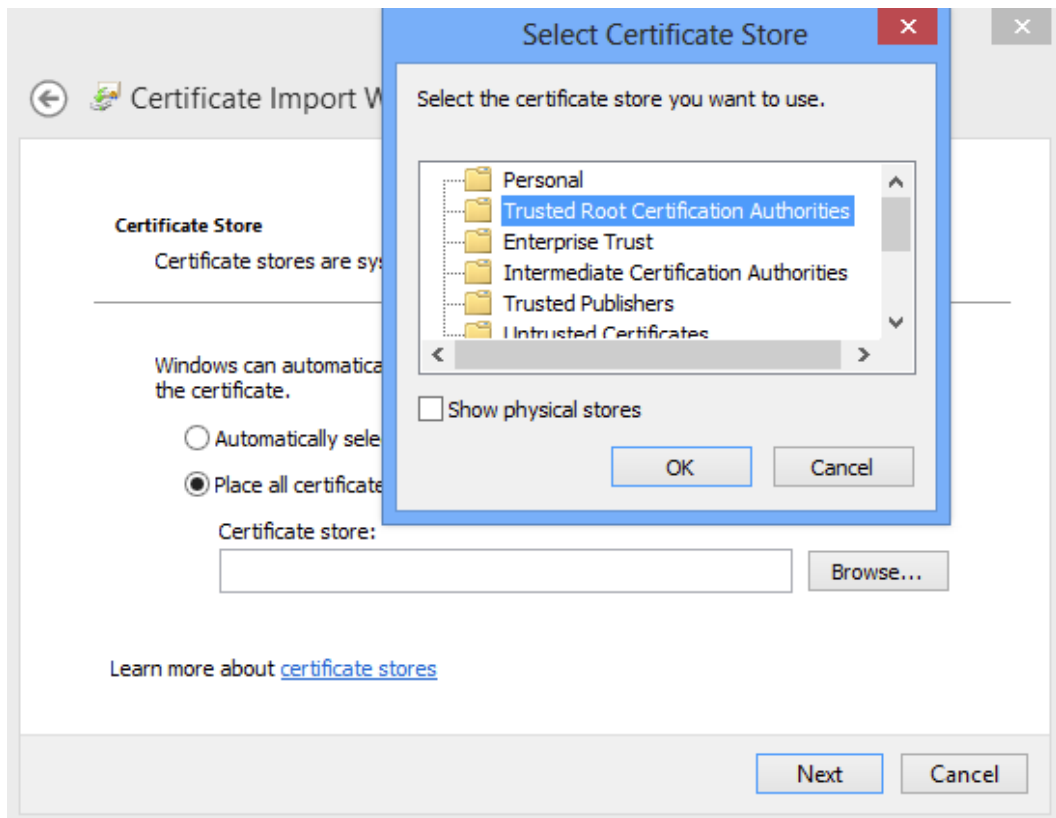
### Mobile Devices



[Download SSL certificate](#)

Use this to connect to [Kerio Connect on your mobile device](#).

3. Open the file and select **Install the certificate**.
4. Select either the current user or local machine.
5. Browse for the **Certificate store** and select **Trusted Root Certification Authorities**.
6. Confirm.



## Configuring Mail on Windows 8



Before you add an Exchange ActiveSync account, you must configure a Microsoft account (e.g. Hotmail, Windows Live, Outlook.com)

1. In the Mail application, go to **Settings** → **Accounts** → **Add an account**.
2. Select **Outlook** and **Show more details**.
3. Fill in the information.
4. **Connect**.

## Add your Outlook account

Enter the information below to connect to your Outlook account.

Email address

Server address

Domain

Username

Password

[Show fewer details](#)

Now you can start using the Mail application and synchronize your Kerio Connect emails, contacts and calendars.

# Synchronizing data with mobile devices

---

## Overview

*Kerio Connect* supports the ActiveSync which is used to synchronize data between the computer (server or workstation) and mobile devices.

ActiveSync is a protocol but it is also an application generally included in mobile devices with Windows Mobile operating systems. It is also a desktop application installed to desktop computers and used to synchronize data with mobile devices connected to the computer via a so called “cradle”.

*Kerio Connect* uses the ActiveSync protocol for direct synchronization of data saved on the server with data stored in mobile devices. It supports synchronization of email folders, calendar, contacts and, in case of some devices, also tasks.

## Supported mobile devices

*Kerio Connect* supports several mobile devices. See the [product website](#) for an overview of supported devices.

## SSL Certificates

HTTP protocol is used for direct communication between *Kerio Connect* and mobile devices. This protocol is not secured and the connection might be wiretapped. This might lead to misuse of your fragile information such as username and password. For this reason, SSL (Secure Socket Layer) encryption is often used for traffic to protect the communication from wiretapping. The HTTP protocol secured by SSL encryption is called HTTPS.

SSL encryption is based on so called SSL certificates. Mailserver disposes of the certificate of the server against which the certificate in your mobile device is suppose to authenticate. There are two types of certificates:

- certificates signed by a trustworthy commercial certification authority,
- self-signed certificates.

If your certificate is signed by a commercial authority, there exists a great chance that the device already includes the certificate and no installation will be required. However, if you use the *Kerio Connect's* self-signed certificate or a certificate signed by an authority not supported by the device, it is necessary to download and install the certificate in your device. The instructions for this procedure are provided below..

## Synchronizing data with mobile devices

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To encrypt your traffic by SSL, download and install the certificate before configuring the *ActiveSync*.

The following guidelines suppose there is a working Internet connection set in your mobile device:

1. In the browser, enter your *Kerio Connect's* URL to open the *Kerio WebMail's* login page.
2. Click on **Download SSL certificate**.
3. Installation of the certificate should be offered by the device. Install it.

The suggested guidelines work on most of mobile devices. However, on some devices installation of the certificate is a bit more difficult:

### ***Allowing installation of a root certificate in WM 5.0 Smartphone Edition***

The security policy of Smartphone devices with *Windows Mobile 5.0* or *Windows Mobile 5.0 AKU2* forbids installation of certificates issued by other than trusted certification authorities.

To allow installation of certificates issued by authorities not supported by the particular device (an internal certificate or the *Kerio Connect's* self-signed certificate), it is necessary to install a mobile device registry editor on the mobile device and use this editor to allow installation of untrustworthy certificates. One of the options is for example application *regeditSTG.zip* (24.01 KB).

In this editor, follow these instructions:

1. Find and download *regeditSTG.zip* (available for free) and unpack it.
2. Move the editor to the mobile phone (e.g. by using the *MS ActiveSync* desktop application).



It is necessary that the file is saved in the phone, not on the memory card.

3. On the telephone, click on the file and run it.
4. Run *regeditSTG.exe* and find `HKLM\Security\Policies\Policies`
5. Change the following registry items:
  - 00001001 overwrite the 2 with 1
  - 00001005 overwrite the 16 with 40
  - 00001017 overwrite the 128 with 144
6. Now you can download the certificate from the server and install it.



So called “hard reset” removes the registry changes (it is necessary to repeat the settings if needed).

### **SSL encryption in Sony Ericsson devices**

If the *Kerio Connect*'s self-signed certificate is installed, the device does not require confirmation for each synchronization with the server:

[Security Information ?] The certificate could not be verified. Select 'Certificate details' to get more information about the certificate. Do you want to accept the certificate and proceed? [ Yes ] [ No ] [ Details ]

Therefore, it is recommended to install a certificate signed by a trustworthy certification authority.

## **Windows Mobile 5.0**

In cooperation with *Kerio Connect*, Windows Mobile 5.0 provides many additional features:

- Windows Mobile 5.0 supports the following folder types:
  - email
  - calendar
  - contacts
  - tasks
- *Wipe* — implementation of the ActiveSync protocol allows the *Kerio Connect* administrator remote removal of all synchronized folders and user login data from the device.

The following options are not supported by *Kerio Connect*:

- SMS-based Always Up-To-Date (AUTD)

Setting of *ActiveSync* on Windows Mobile 5.0 is identical with settings on Windows Mobile 5.0 AKU2.

## **Windows Mobile 5.0 AKU2**

In cooperation with *Kerio Connect*, Windows Mobile 5.0 AKU2 provides these features:

- Windows Mobile 5.0 AKU2 supports the following folder types:

## Synchronizing data with mobile devices

---

- email
  - calendar
  - contacts
  - tasks
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
  - *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
  - *Wipe* — so called “wipe” allows *Kerio Connect* administrators reset remote devices. This reset clears all user data out of the device. Only default files and settings will be kept on the mobile device.

The following features of Windows Mobile 5.0 AKU2 are not supported by *Kerio Connect*:

- Setting of security policy from the server (Enforce Security Policy)
- SMS-based Always Up-To-Date (AUTD)

### ActiveSync settings in Pocket PC Edition

It is not necessary to install the *ActiveSync* application since it is included in the Windows Mobile operating system (it can be found under **Start** → **Programs**).

Before the starting to configure, it is necessary to check if connection of the device to network is set correctly (required for connection to the mailserver). This can be tested for example by using *Internet Explorer* to connect to *Kerio WebMail*.

If the connection does not fail, you can start to set the *ActiveSync* application:

1. In **Start** → **Programs**, use the *ActiveSync* icon to run the application.



Figure 1 ActiveSync icon



- When setting the ActiveSync device for the first time, an informative tips are displayed to guide you through. Click on the **set up your device to sync with it** link.

If you already know how to set ActiveSync, open same dialog from **Menu** → **Add Server Source**. This method can be also used whenever you need to change the configuration.

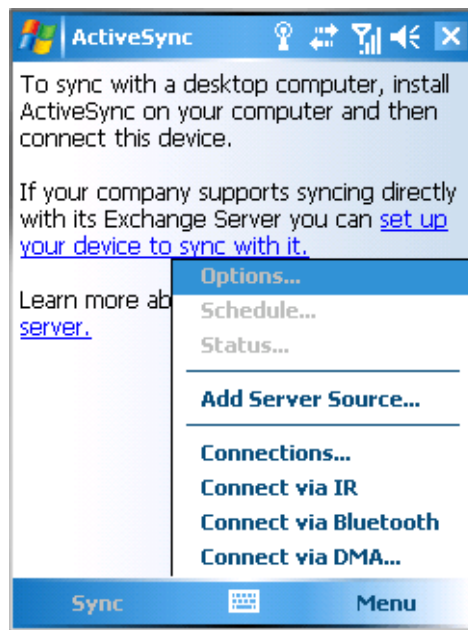


Figure 2 ActiveSync menu



In case that the ActiveSync application has already synchronized data with another mailserv, remove the settings by clicking on the **Delete** button in **Menu** → **Options**.

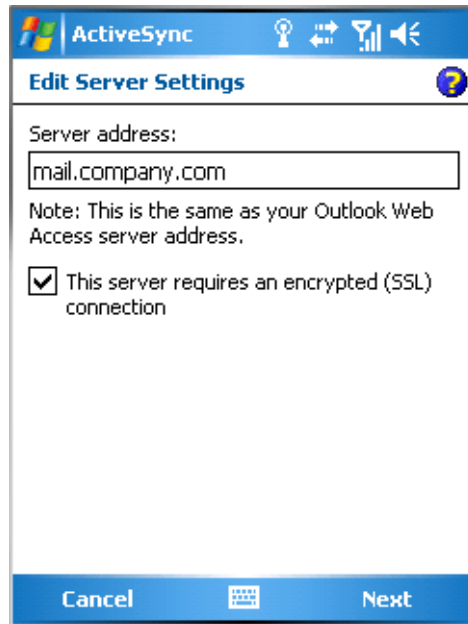
- This opens the first page of the configuration wizard used for specification of the *Kerio Connect's* Internet name.

The **This server requires an encrypted (SSL) connection** option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or another internal certificate, it is necessary to install another certificate on the device.

Once the server name is set and SSL encryption enabled, click on **Next** to open the following page of the configuration wizard.

- On the second page, set your login data:



ActiveSync

**Edit Server Settings**

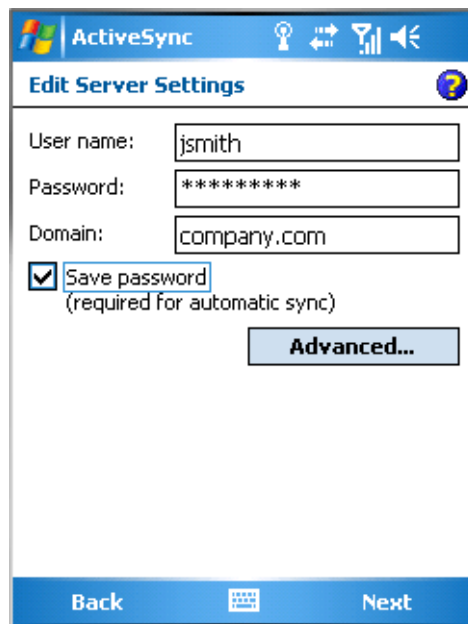
Server address:  
mail.company.com

Note: This is the same as your Outlook Web Access server address.

This server requires an encrypted (SSL) connection

Cancel    Next

**Figure 3** ActiveSync — specification of a mailservers and setting secure traffic



ActiveSync

**Edit Server Settings**

User name: jsmith

Password: \*\*\*\*\*

Domain: company.com

Save password  
(required for automatic sync)

Advanced...

Back    Next

**Figure 4** ActiveSync — user login data definition

### User name

Use this entry to specify the user name used for authentication to *Kerio Connect*.

### Password

Use this entry to specify the password used for authentication to *Kerio Connect*.

### Domain

Use this textfield to enter the email domain name (usually it is the part of your email address after the @ symbol).

### Save password

If you do not wish to be asked for the login data by each startup of the synchronization, enable this option. If you want to use the feature of automatic synchronization, this option is required to be enabled.

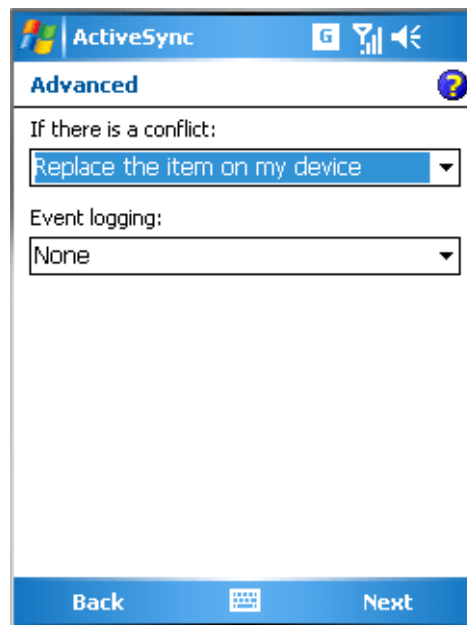


Figure 5 ActiveSync — the Advanced dialog box



Besides login data items, the **Advanced** button is included in this dialog. It can be used to set optional parameters. The dialog allows to set measures to be taken in case that a collision occurs during the synchronization.

Collisions might occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. According to the parameters set here, *ActiveSync* will either beat the change performed on the server with the one applied on the device or the other way round. By default, the server beats the device. It is recommended to keep these settings.

Once the settings are done, click on **Next**.

5. The following dialog provides a list of all folder types which can be synchronized. Check only those folders that will be synchronized and leave unchecked or uncheck the others.

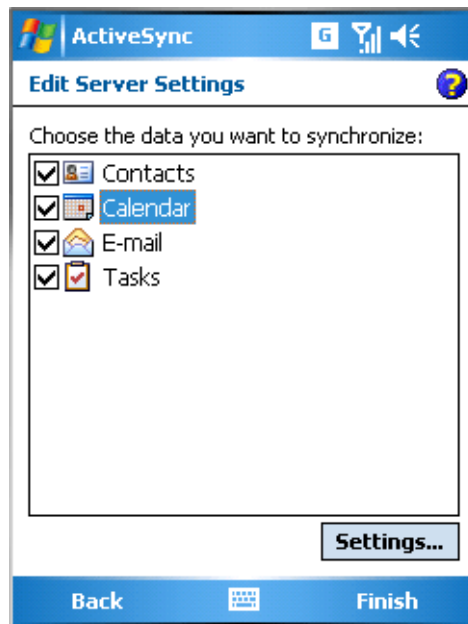


Figure 6 ActiveSync — folder synchronization settings

The **Settings** button also included in the dialog is active only upon clicking on the **Calendar** or **E-mail** folder and it opens a dialog where synchronization parameters for calendar and email folders can be set. The **Contacts** and **Tasks** folders do not contain any other parameters.

### Calendar Sync Options

Selection of the **Calendar** folder and a consequent clicking on **Settings** opens a dialog with synchronization settings. The dialog includes a menu where it can be set how old data will be synchronized.

New events will be synchronized without exception. However, to shorten the time needed for synchronization, it is possible to set the maximum age of events to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

### E-mail Sync Options

Selection of the **Calendar** folder and a consequent clicking on **Settings** opens a dialog with synchronization settings. The dialog includes several options to customize synchronization:

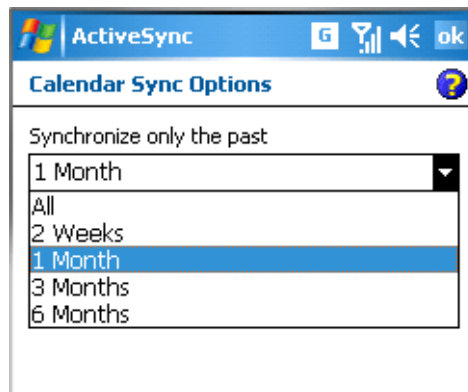


Figure 7 ActiveSync — calendar synchronization settings

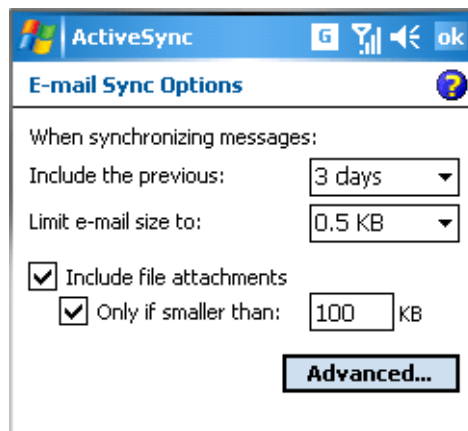


Figure 8 ActiveSync — email synchronization settings

- **Include the previous** — this option allows to set how old messages will be synchronized. By default, messages up to three days old are included in the synchronization.
- **Limit e-mail size to** — only messages of size up to the value set will be synchronized.
- **Include file attachments** — if this option is enabled, attachments are also included in synchronization.
- **Only if smaller than** — the value entered in this option sets the maximum size of email attachments to be synchronized. Larger attachments are excluded from synchronization.

The settings described above help decrease time needed for synchronization as well as the load of the synchronization on network connection.

6. Once the settings are done, save the configuration by clicking on **Finish**. Now, the first synchronization between the device and *Kerio Connect* will be started.

During the synchronization, a dialog appears requiring confirmation of appliance of the security policy. Use the **OK** button for confirmation, otherwise the synchronization will not be completed correctly.

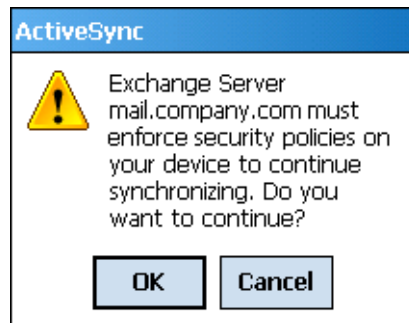


Figure 9 Wipe confirmation

Other *ActiveSync* settings are focused in your device's user's guide.

### ActiveSync settings in Smartphone Edition

It is not necessary to install the *ActiveSync* application since it is included in the Windows Mobile operating system (it can be found under **Start** → **ActiveSync**).

Before the starting to configure, it is necessary to check if connection of the device to network is set correctly (required for connection to the mailserver). This can be tested for example by using *Internet Explorer* to connect to *Kerio WebMail*.

If the connection does not fail, you can start to set the *ActiveSync* application:

1. In **Start Programs**, use the *ActiveSync* icon to run the application.



Figure 10 ActiveSync icon

2. Click on **Menu** and select **Add Server Source**.

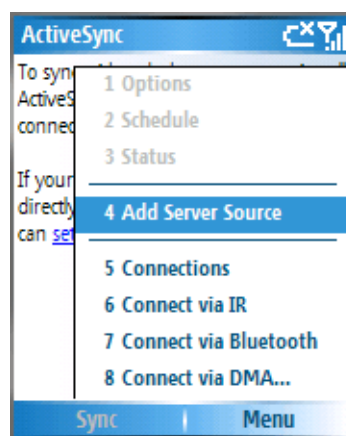


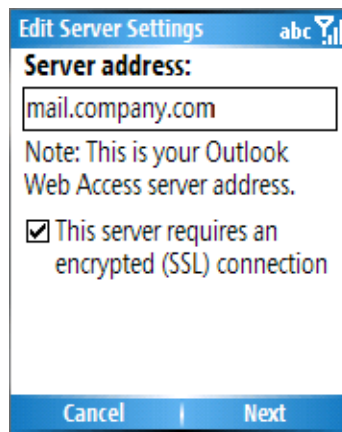
Figure 11 ActiveSync menu



In case that the ActiveSync application has already synchronized data with another mailserver, remove the settings by clicking on the **Delete** button in **Menu** → **Options**.

- This opens the synchronization's configuration wizard.

On the first page of the wizard, use the **Server address** entry to specify the server's Internet name.



**Figure 12** ActiveSync — specification of a mailserver and setting secure traffic

The **This server requires an encrypted (SSL) connection** option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or a certificate signed by an internal authority, it is necessary to install another certificate on the device.

Once the server name is set and SSL encryption enabled, click on **Next** to open the following page of the configuration wizard.

- On the second page, set your login data:

**User name**

Use this entry to specify the user name used for authentication to *Kerio Connect*.

**Password**

Use this entry to specify the password used for authentication to *Kerio Connect*.

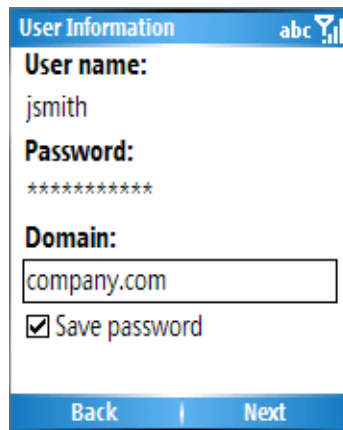


Figure 13 ActiveSync — user login data definition

### Domain

Use this textfield to enter the email domain name (usually it is the part of your email address after the @ symbol).

### Save password

If you do not wish to be asked for the login data by each startup of the synchronization, enable this option. This option is required to be enabled especially if you want to use the feature of automatic synchronization.

5. The following dialog provides a list of all folder types which can be synchronized. Check only those folders that will be synchronized and leave unchecked or uncheck the others.

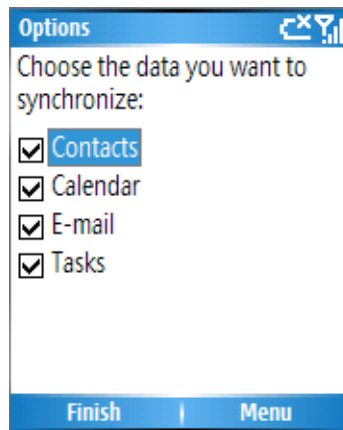


Figure 14 ActiveSync — folder synchronization settings

Synchronization of email and calendar allows additional settings. Select **Calendar** or **E-mail** and click on **Menu**. In the menu just opened, select **Settings**. This opens a dialog providing options in accordance with type of item to be synchronized:



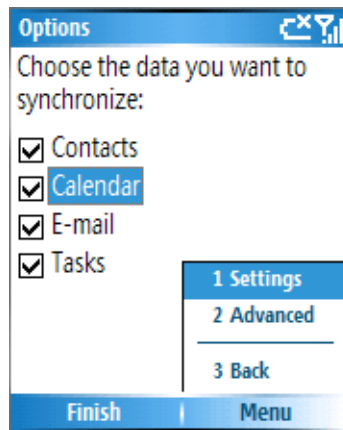


Figure 15 Folder synchronization settings — Menu

### Calendar Sync Options

The **Calendar Sync Options** dialog includes a menu where it can be set how old data will be synchronized.

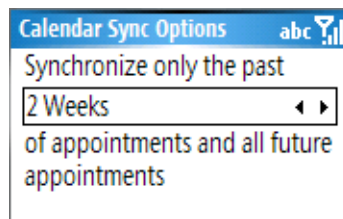


Figure 16 Folder synchronization settings — calendar

New events will be synchronized without exception. However, to shorten the time needed for synchronization, it is possible to set the maximum age of events to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronize also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

### E-mail Sync

The **E-mail Sync** dialog includes two parameters to be customized:

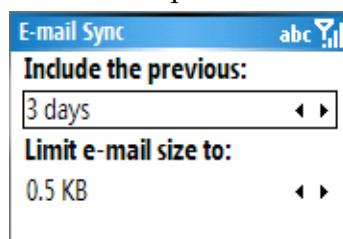


Figure 17 Folder synchronization settings — email

## Synchronizing data with mobile devices

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- **Include the previous** — this option allows to set how old messages will be synchronized. By default, messages up to three days old are included in the synchronization.
- **Limit e-mail size to** — only messages of size up to the value set will be synchronized.

The settings described above help decrease time needed for synchronization as well as the load of the synchronization on network connection.

6. Before closing the wizard, click on the **Menu** button and select the **Advanced** option. It allows setting of optional parameters. The dialog allows to set measures to be taken in case that a collision occurs during the synchronization.

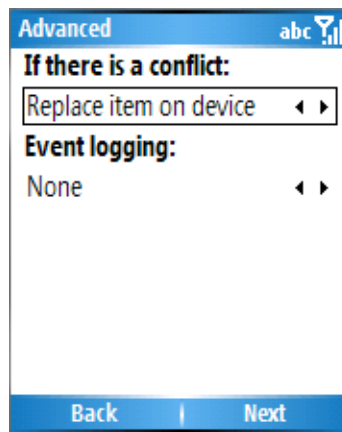


Figure 18 ActiveSync — the Advanced dialog box

Collisions might occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. According to the parameters set here, *ActiveSync* will either beat the change performed on the server with the one applied on the device or the other way round. By default, the server beats the device. It is recommended to keep these settings.

Once the settings are done, click on **Next** and consequently on the **Finish** button to save settings.

7. Once the settings are done, save the configuration by clicking on **Finish**. Now, the first synchronization between the device and *Kerio Connect* will be started.

During the synchronization, a dialog appears requiring confirmation of appliance of the security policy. Use the **OK** button for confirmation, otherwise the synchronization will not be completed correctly.

Other *ActiveSync* settings are focused in your device's user's guide.

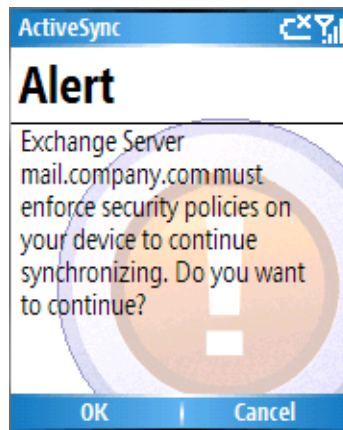


Figure 19 Wipe confirmation

## Windows Mobile 6.0

In cooperation with *Kerio Connect*, Windows Mobile 6.0 provides the following features:

- Windows Mobile 6.0 supports the following folder types:
  - email
  - calendar
  - contacts
  - tasks
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- *Wipe* — so called “wipe” allows *Kerio Connect* administrators reset remote devices. This reset clears all user data out of the device. Only default files and settings will be kept on the mobile device.

If you perform synchronization via *ActiveSync 12*, your device will also support:

- HTML emails,
- message flags,
- the “Out of office” feature.

## Synchronizing data with mobile devices

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The following features of Windows Mobile 6.0 are not supported by *Kerio Connect*:

- Setting of security policy from the server (Enforce Security Policy)
- SMS-based Always Up-To-Date (AUTD)

Setting of *ActiveSync* on Windows Mobile 6.0 is identical with settings on Windows Mobile 5.0 AKU2.

### Nokia Eseries

*Nokia Eseries* allows folder synchronization by the *ActiveSync* protocol if the *Nokia's Mail For Exchange* application is installed on the device.

Devices E52, E55, E72 and E75 already have *Mail for Exchange* installed.

*Mail For Exchange* with *Kerio Connect* provide the following options and features:

- *Nokia Eseries* supports the *ActiveSync* protocol, version 2.5.
- *Nokia Eseries* supports synchronization of the following folder types:
  - Inbox — other email folders are not synchronized.
  - Other folders and subfolders (only Nokia E52 — E75 with integrated Mail for Exchange).
  - Calendar — the default private calendar.
  - Contacts — the default private contact folder.
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- This version allows installation of the root certificate on the device — this implies that it is also possible to use the *Kerio Connect's* self-signed certificate for encryption.

*Mail For Exchange* does not support the following features:

- It is not possible to synchronize public and shared folders.
- It is not possible to accept/reject an invitation. Invitations can be viewed in **Inbox** but it cannot be manipulated — it does not offer the **Accept** and **Reject** buttons and it is not displayed in the calendar.

## Mail For Exchange Settings

The *Mail for Exchange* application is not included in the mobile device set. Therefore, it is necessary to install it. Import and installation of the application is described in the application's guide which is available at the Nokia website.



This chapter describes settings for devices *Nokia E60* and *Mail For Exchange 1.3.0*. It can, therefore, slightly differ on other versions.

1. After installation of *Mail for Exchange*, locate the application and open it.



Figure 20 Icon of Mail For Exchange 1.3.0

2. In the application, select the Sync mode option.

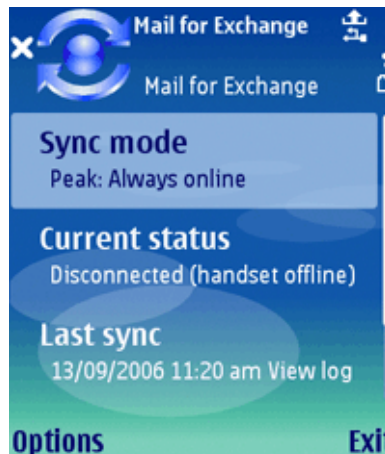


Figure 21 Mail For Exchange welcome page

3. In the menu just opened, select the **Edit profile** option.
4. In the **Profile** menu, select **Connection**.

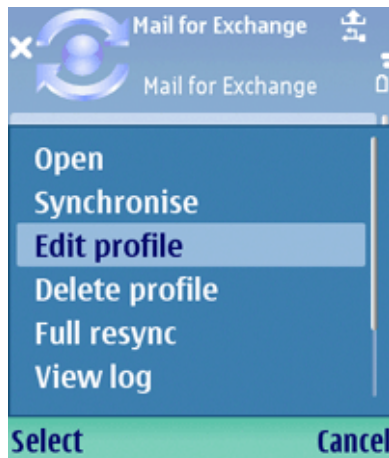


Figure 22 Options → Edit profile



Figure 23 The Edit profile menu

5. This opens a dialog for connection to the server. The first section to be set is the **Connection** tab. The following parameters are to be set here:

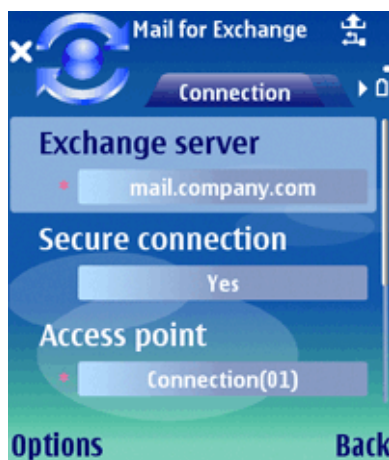


Figure 24 The Connection dialog

### Exchange server

Enter the server's internet name or IP address.

### Secure connection

The **Secure connection** option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To allow the encryption, it is required that an SSL certificate is installed on the device. If your company uses certificates authorized by a commercial certification authority, it is possible that your device already includes support for SSL encryption. If the company uses a certificate generated by *Kerio Connect* or another internal certificate, it is necessary to install another certificate on the device.

Now, save settings of the tab.

- In the **Profiles** menu, select **Credentials**. Enter login information used for connection to your mailbox:

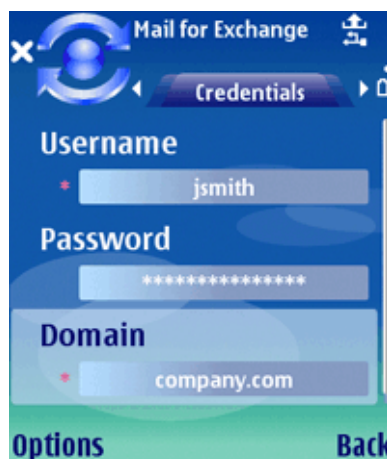


Figure 25 The Credentials dialog

### Username

Use the **Username** textfield to enter username used for connection to the mailbox in *Kerio Connect*.

### Password

Use the **Password** textfield to enter password used for connection to the mailbox in *Kerio Connect*.

### Domain

Use the **Domain** textfield to enter the name of the email domain (if you are not sure about this part, contact your administrator).

Save the settings.

- In the **Profiles** menu, select **Sync content**. On this tab, set folders to be synchronized. The tab also allows selection of preferred store for possible collisions. Collisions might

## Synchronizing data with mobile devices

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occur when some folders to be synchronized have been changed both on the server and on the device since the last synchronization. In accordance with the settings, either the changes performed on the server will beat and overwrite the changes in performed on the device (the **Server wins** option) or the other way round (the **Phone wins** option) within the *ActiveSync*. By default, the server beats the device. It is recommended to keep these settings.



Figure 26 The Sync content dialog

8. In the **Profiles** menu, select **Sync schedule**. On this tab it is possible to schedule automatic synchronization:

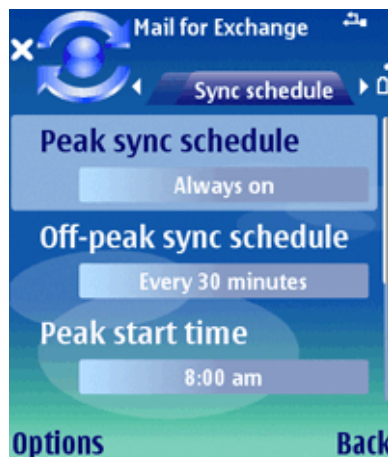


Figure 27 The Sync Schedule dialog

### Peak sync schedule

Sets the synchronization interval for peak time (the time when you need as fresh information as possible, usually this time includes the working hours).



**Off-peak sync schedule**

Sets the synchronization interval for off-peak time (usually at night).

**Peak start time**

Setting of the peak time start.

**Peak end time**

Setting of the peak time end.

**Peak days**

Setting of peak days (all working days are set by default).

- Return to the **Profiles** menu and select the **Calendar** option. On this tab it is possible to set parameters for automatic synchronization (see figure [27](#)):

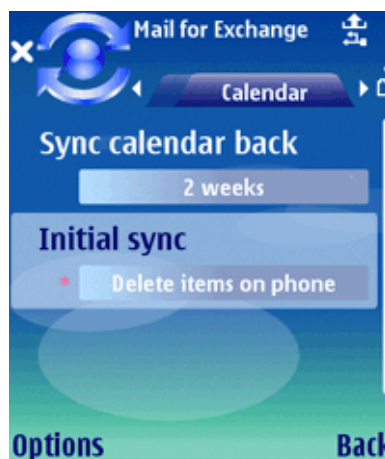


Figure 28 The Calendar dialog

**Sync calendar back**

All upcoming events are included in the synchronization. However, to shorten the time needed for synchronization, it is possible to set the maximum age of events to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, data up to two weeks old is synchronized. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

**Initial sync**

Before the first synchronization of the server with the device, it is necessary to remove one of the stores to avoid collisions. The *Initial sync* option specifies whether data on the server (**Keep items on phone**) or on the device (**Delete items on phone**) will be removed during the first synchronization.

## Synchronizing data with mobile devices

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10. In the **Profiles** menu, select the **Contacts** option. This tab allows setting of solution for possible initial collision. Before the first synchronization of the server with the device, it is necessary to remove one of the stores to avoid collisions. The *Initial sync* option specifies whether data on the server (**Keep items on phone**) or on the device (**Delete items on phone**) will be removed during the first synchronization.

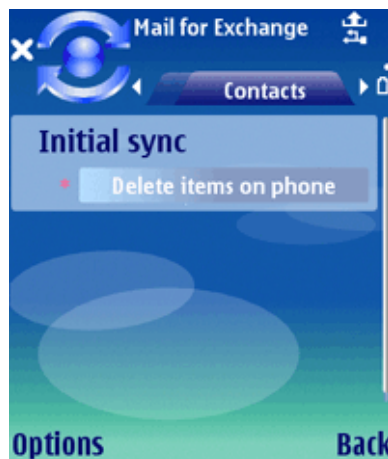


Figure 29 The Contacts dialog

11. In the **Profiles** menu, select the **Email** option. On this tab, it is possible to set parameters of synchronization of email folders:



Figure 30 The Email dialog

### Email address

The option requires entering of the email address.

### Show new mail pop-up

Enables/disables new mail notifications.

**Use signature**

Allows adding of a footer to email messages.

**Signature**

Footer definition.

**When sending mail**

Setting of time when email is sent (immediately or during the upcoming synchronization).

**Sync messages back**

All unread messages are included in the synchronization. However, to shorten the time needed for synchronization, it is possible to set the maximum age of messages to be synchronized (it is not necessary to synchronize old data where the information will not be needed any longer).

By default, synchronization is set to messages up to three days old. If you need to synchronized also older data, change the settings. In such a case, bear in mind that at least the first synchronization may take longer.

## Nokia N73 and N95

*Nokia N73 and N95* allows folder synchronization by the ActiveSync protocol if the *Nokia's Mail For Exchange 1.6.1* or higher is installed on the device.

*Mail For Exchange* with *Kerio Connect* provide the following options and features:

- *Nokia N73 and N95* supports the ActiveSync protocol, version 2.5.
- *Nokia N73 and N95* supports synchronization of the following folder types:
  - Inbox — other email folders are not synchronized.
  - Calendar — the default private calendar.
  - Contacts — the default private contact folder.
- *DirectPush Technology* — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- *Kerio Connect* supports *Global Address Lookup* — this feature allows to look up email addresses in all contact folders available to the particular user (including public folders).
- This version allows installation of the root certificate on the device — this implies that it is also possible to use the *Kerio Connect's* self-signed certificate for encryption.

## Synchronizing data with mobile devices

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*Mail For Exchange* does not support the following features:

- It is not possible to synchronize public and shared folders.
- It is not possible to accept/reject an invitation. Invitations can be viewed in **Inbox** but it cannot be manipulated — it does not offer the **Accept** and **Reject** buttons and it is not displayed in the calendar.

## RoadSync

*Kerio Connect* supports the *RoadSync 2.0* application developed by *DataViz*. *RoadSync* enables synchronization between *Kerio Connect* and mobile devices.

*RoadSync* supports synchronization of the following folder types:

- Email,
- Calendar,
- Contacts,

The *RoadSync* application can be installed on the following mobile devices:

- Symbian UIQ,
- Symbian S80,
- Symbian S60 3rd Edition,
- Palm OS (synchronization is available for email only),
- Java MIDP 2.0 (synchronization is available for email only),

For details on *RoadSync* and supported devices, see the *DataViz* website at <http://www.dataviz.com/>.

## Apple iPhone

### Apple iPhone 2.0

This section addresses both *Apple iPhone 3G* and *Apple iPhone 1.0* with the OS X 2.0 firmware.

In additions to all options available also for OS X 1.0, *Apple iPhone* with OS X 2.0 supports the ActiveSync protocol for direct data synchronization. This implies that now *Kerio Connect* in cooperation with *Apple iPhone 2.0* provides the following options:

- *Apple iPhone* allows synchronization of:

- email,
  - calendar,
  - contacts.
- Apple iPhone fully supports the device clean-up feature, so called “Device Wipe”. In short, the device can be cleared (deletion of all data and settings) remotely in case that it gets lost or stolen.



If you happen to lose your *Apple iPhone* or it gets stolen, contact your network administrator immediately to get the device wiped remotely.

- DirectPush Technology — this technology allows mobile devices to keep open HTTP(S) connection with the server. Whenever a new item is received or any change is performed in any folder, changes are synchronized immediately.
- Global Address Lookup — this feature allows look-up of email addressed in contact folders.

### ***Account settings***

To configure ActiveSync (Exchange), follow these guidelines:

1. In *Apple iPhone*, go to **Settings** → **Mail, Contacts, Calendars**.
2. Select **Add Account**.
3. Select the **Microsoft Exchange** account type.
4. Enter the following account data:

#### **Email**

Enter the primary email address consisting of username and domain (e.g. `jflyhigh@company.com`, where `jflyhigh` is a username and `company.com` is an email domain).

#### **Server**

Enter DNS name of *Kerio Connect*.

#### **Username**

Enter username for login to your *Kerio Connect* mailbox.

## Synchronizing data with mobile devices

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### Password

Enter password for your mailbox.

### Description

This is an optional entry. The description is helpful especially if you intend to use multiple accounts.

### Use SSL

This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* and click on **Download SSL certificate**.

5. In the dialog opened, select which folder types will be synchronized. Uncheck only items you would really not use.
6. Once the settings are saved, the **Mail days to sync** item appears — open it and set how old items will be involved in synchronization. This measure helps avoid that the synchronization takes too long and that too much needless data is downloaded.

At the end, set how often the synchronization will be performed. This can be done in **Settings** → **Fetch New Data**. On the **Advanced** tab, you can also find setting of synchronization type for your Exchange account.

## Apple iPhone 3.0

In *Apple iPhone OS 3.0*, all features of previous *Apple iPhone OS* versions are available.

Newly, the following features have been introduced for *Apple iPhone*:

- CalDAV protocol (allows calendar synchronization),
- standard iCalendar (allows to download shared and public calendars for reading),
- LDAP protocol (allows to access contacts via LDAP).
- support for ActiveSync 12.1 (allows direct search in emails stored in *Kerio Connect* via Exchange account).



Once the upgrade is completed successfully, it is necessary to remove and reconfigure the Exchange account, otherwise the device will keep attempting to connect to *Kerio Connect* via *ActiveSync 2.5*

In addition to features described above, the system introduces other improvements, such as:

- the Copy&Paste method both for text and graphic items during email composition,
- while composing an email message, it is possible to switch the client to the horizontal position,
- notifications of new email delivered to other folders than the Inbox,
- creating and sending invitations from ActiveSync account (including showing of availability of individual users),
- notes synchronization with desktop applications *Apple Mail* and *MS Outlook* via *Apple iTunes*.

For details on individual enhancements and their implementation options, refer to the [Apple](#) website. In the following sections, you will find settings applying to the very communication with *Kerio Connect*:

### ***Configuration of CalDAV account***

To configure CalDAV account, follow these guidelines:

1. In *Apple iPhone*, go to **Settings** → **Mail, Contacts, Calendars**.
2. Select **Add Account** → **Other** → **Add CalDAV Account**.
3. Enter the following account data:

#### **Server**

Enter DNS name of *Kerio Connect*.

#### **User**

Enter username for login to your *Kerio Connect* mailbox.

#### **Password**

Enter password for your mailbox.

#### **Description**

This is an optional entry. The description is helpful especially if you intend to use multiple accounts.

4. Click on **Next** to open the **Unable to Verify Certificate** dialog. If you continue, the connection either fails due to the server's security policy or it is established successfully but the traffic is not protected from tapping. Therefore, it is strongly unrecommended to use unencrypted traffic. To switch to secured connection, click on **Cancel** and go to **Advanced Settings**:

## Synchronizing data with mobile devices

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### Use SSL

This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* and click on **Download SSL certificate**.

### Port

Default ports for communication must be changed as follows:

For HTTPS: 8443 → 443 (to enable the **Use SSL** option, use port 443)

For HTTP: 8008 → 80



The settings apply if standard ports for HTTP protocol are set on the server. If connection to the server with these settings fails, contact your network administrator and check that non-standard ports are not used for *Kerio Connect* traffic.

### Account URL

Enter URL of the calendar account including the port number specified in the **Port** entry.

For example, the URL will be as follows for domain *company.com* and port 80:

- *for your personal account:*  
`http(s)//mail.company.com:80/calDav`
- *for a shared calendar of user wsmith:*  
`http(s)//mail.company.com:80/calDav/users/company.com/wsmith`
- *for the calendar of the resource car1:*  
`http(s)//mail.company.com:80/calDav/users/company.com/car1`
- *for public calendar:*  
`http(s)//mail.company.com:80/calDav/users/company.com/.public`

To view new calendars, go to the *Calendar* application by clicking on **Calendars**. In the list, simply click on the calendar you want to open.

### **Subscription to calendars**

To subscribe calendar in the iCalendar format, follow these steps:

1. In *Apple iPhone*, go to **Settings** → **Mail, Contacts, Calendars**.
2. Select **Add Account** → **Other** → **Add Subscribed Calendar**.
3. Enter the following account data:



**Server**

Insert URL in this pattern: `servername/ical`

4. If the account authentication fails, check the following items:

**Server**

Enter URL in a format compatible with calendar subscription. Basic URL follows this pattern: `servername/ical` The basic URL can be used to subscribe to the main calendar of your account. To subscribe to other calendars, use the following (derived) URL patterns:

`servername/ical/users/domain/user@domain` — URL modified for the purpose of subscription to a shared calendar (e.g. `mail.company.com/ical/users/company.com/wsmith@company.com`).

`servername/ical/users/domain/room@domain` — URL modified for the purpose of subscription to a resource calendar (e.g. `mail.company.com/ical/users/company.com/meetingroom1@company.com`).

**Description**

This is an optional entry. The description is helpful especially if you intend to use multiple calendars.

**User**

Enter username for login to your *Kerio Connect* mailbox.

**Password**

Enter password for your mailbox.

**Use SSL**

This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* and click on **Download SSL certificate**.

**Remove alarms**

It is recommended to enable this option, as it will not be possible to disable alarms after having downloaded the calendar to the device.

To view new calendars, go to the *Calendar* application by clicking on **Calendars**. In the list, simply click on the calendar you want to open.



Download of large shared or public calendars via slow connection (GPRS, EDGE) can result in temporary unavailability of the calendar to other users.

## Synchronizing data with mobile devices

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### *LDAP client configuration*

To configure LDAP account, follow these guidelines:

1. In *Apple iPhone*, go to **Settings** → **Mail, Contacts, Calendars**.
2. Select **Add Account** → **Other** → **Add LDAP Account**.
3. Enter the following account data:

**Server**

Enter DNS name of *Kerio Connect*.

**User**

Enter username for login to your *Kerio Connect* mailbox.

**Password**

Enter password for your mailbox.

**Description**

This is an optional entry. The description is helpful especially if you intend to use multiple calendars.



The application cannot read some types of SSL certificates, so it is recommended to connect only via an unsecured version of the LDAP protocol.

LDAP search is available in the *Contacts* application. Simply click on **Groups** to go to contact lists and select an item to view.

### *Meeting scheduling and availability settings in Exchange account*

To create an invitation, follow these instructions:

1. On *Apple iPhone*, run the *Calendar* application.
2. Create a calendar event.
3. Enter standard information, such as name and location of the event as well as its start and end times.
4. Click on **Invitees**.
5. Enter or select contact of persons to invite and click on **Done**.
6. Click on **Availability**.
7. Select free/busy mode of the appointment to be showed in your free/busy calendar.

## Apple iPhone 4.0

In *Apple iPhone OS 4.0*, all features of previous *Apple iPhone OS* versions are available.

Newly, *Apple iPhone* supports synchronization of contacts via the CardDAV protocol.

### *CardDAV account settings*

To configure CardDAV account, follow these guidelines:

1. In *Apple iPhone*, go to **Settings** → **Mail, Contacts, Calendars**.
2. Select **Add Account** → **Other** → **Add CardDAV Account**.
3. Enter the following account data:

#### **Server**

Enter DNS name of *Kerio Connect*.

#### **User**

Enter username for login to your *Kerio Connect* mailbox.

#### **Password**

Enter password for your mailbox.

#### **Description**

This is an optional entry.

4. Upon clicking on **Save**, iPhone attempts to establish connection.

By default, iPhone is set to encrypted traffic (HTTPS) on standard ports. If connection over HTTPS fails, iPhone attempts to connect via HTTP (unsecured connection).

If connection to the server fails, contact your network administrator and check that non-standard ports are not used for *Kerio Connect* traffic. If they are, it is necessary to set ports manually.

Go to **Advanced Settings** and set the following parameters:

#### **Use SSL**

This option allows encryption of any traffic between the server and the device. It is highly recommended to keep the option enabled to protect your connections from debugging and misuse.

To enable traffic encryption, it is necessary that an SSL certificate is installed in *Kerio Connect*. To get the certificate, go to the *Kerio WebMail* login page in *Safari* and click on **Download SSL certificate**.

#### **Port**

Set ports for HTTP and HTTPS traffic by using information provided by your network administrator.

## Synchronizing data with mobile devices

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New contacts are located in the *Contacts* application. To get there, click on the **Contacts** button.

CardDAV account can be used for synchronization of the user's personal contacts — shared and public contacts are not involved in the synchronization.

### Apple iOS

*Kerio Connect* now comes with an autoconfig tool for *iOS* systems. This tool enables simple setting of automatic synchronization of:

- mailboxes
- contacts
- calendars

How to use the autoconfig tool?

1. In a browser running on an *iOS* system, enter the address of your mailserver. On the login page, click on **Set up my phone** (below the login dialog) and then on **Mail, Contacts, Calendars**.



Figure 31 iOS configuration

- To create an *Exchange ActiveSync* account, click on **Continue**.



For your security, it is recommended to use secured connection.



To configure your device with *CalDAV*, *CardDAV* and *IMAP*, use the link below the **Continue** button.

- This opens the installation page. Click on **Install** to run installation. You will be asked for your account's password.

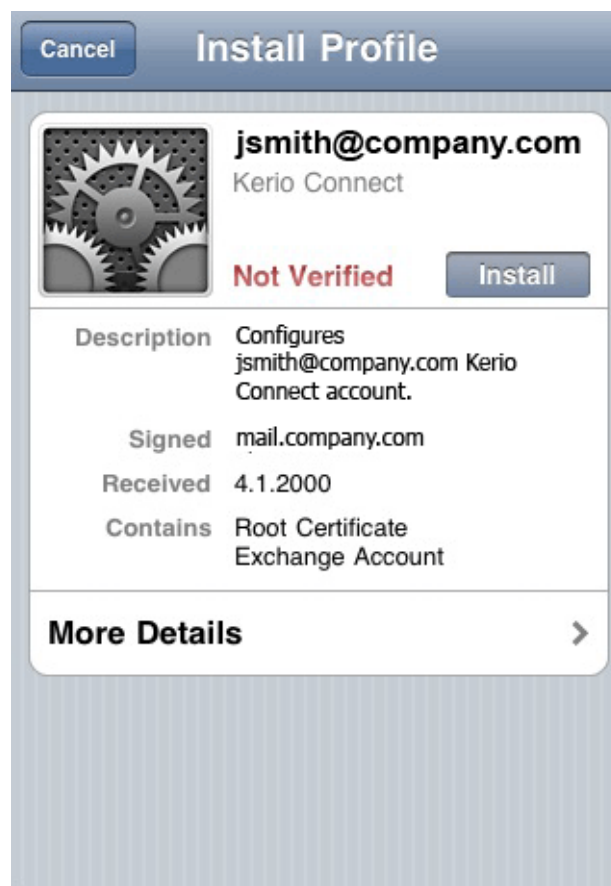


Figure 32 Installation page

You can click on **More details** to view what will be included in the installation.

- Once the installation is completed, you can start using your mailbox immediately.

# Configuring Microsoft Windows Phone 8 using Exchange ActiveSync

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## Overview

Kerio Connect 8.0.1 and above supports the ability to synchronize mail, contacts, calendars, and tasks to Microsoft Windows Phone 8 devices via the Exchange ActiveSync protocol (EAS).



Beginning May 1, 2013, the support of Exchange ActiveSync in Kerio Connect is available as an add-on. For detailed information, read the [Exchange ActiveSync FAQs](#).

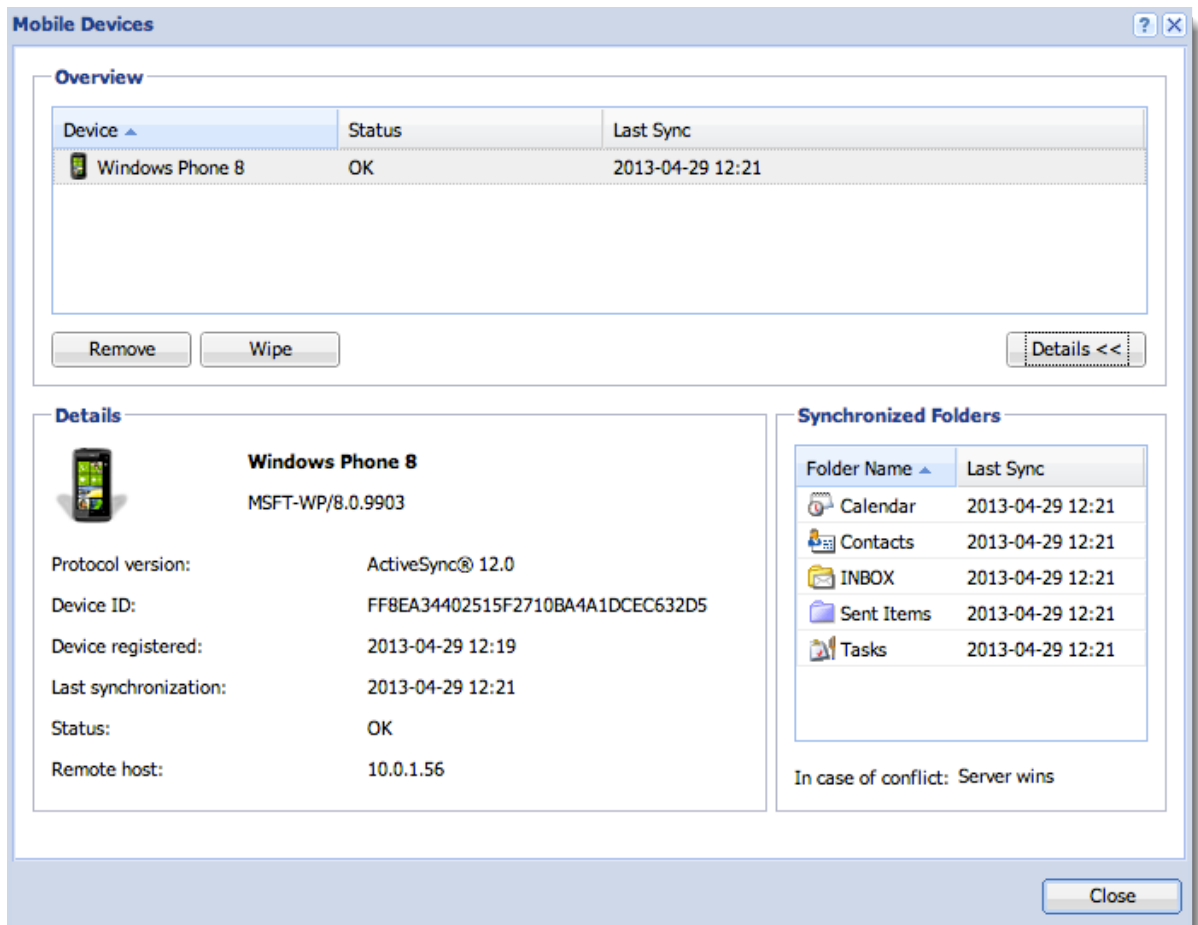
## Configuring Kerio Connect

There is no additional configuration necessary to support Exchange ActiveSync (EAS) from Microsoft Windows Phone 8.

Check the following items:

- Exchange ActiveSync add-on in Kerio Connect
- HTTPS service running and port 443 open on your firewall

The status of configured EAS devices can be viewed from the users dialog once the account has been successfully added. In the administration interface, go to **Accounts** → **Users**, right click on a user and select **More Actions** → **Mobile Devices**....



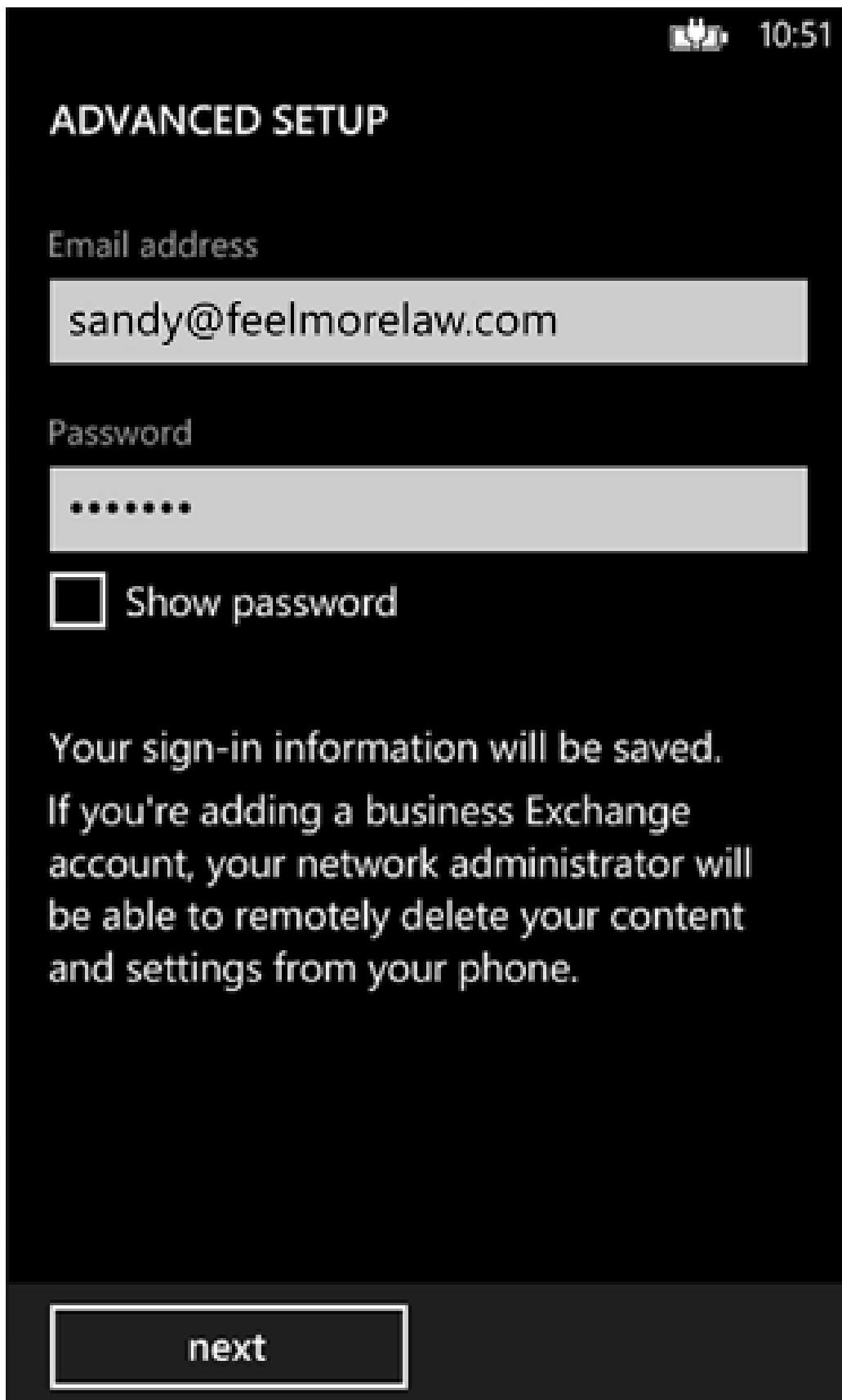
## Configuring Windows Phone 8

1. Launch the mail application from the home screen.
2. If it is the first time, create a new account. Otherwise, choose **add email account** from the menu options.
3. Select **advanced setup**.

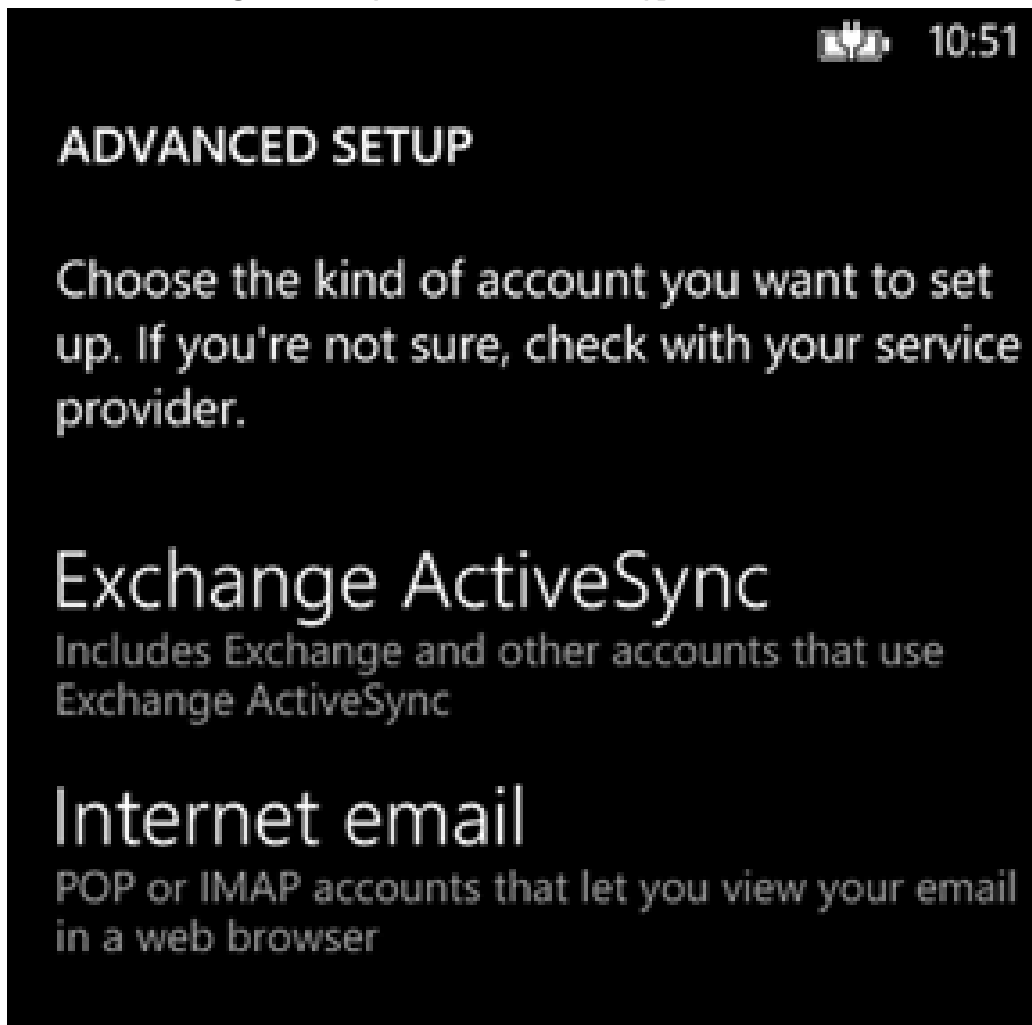


4. Enter your email address and password and click **next**.

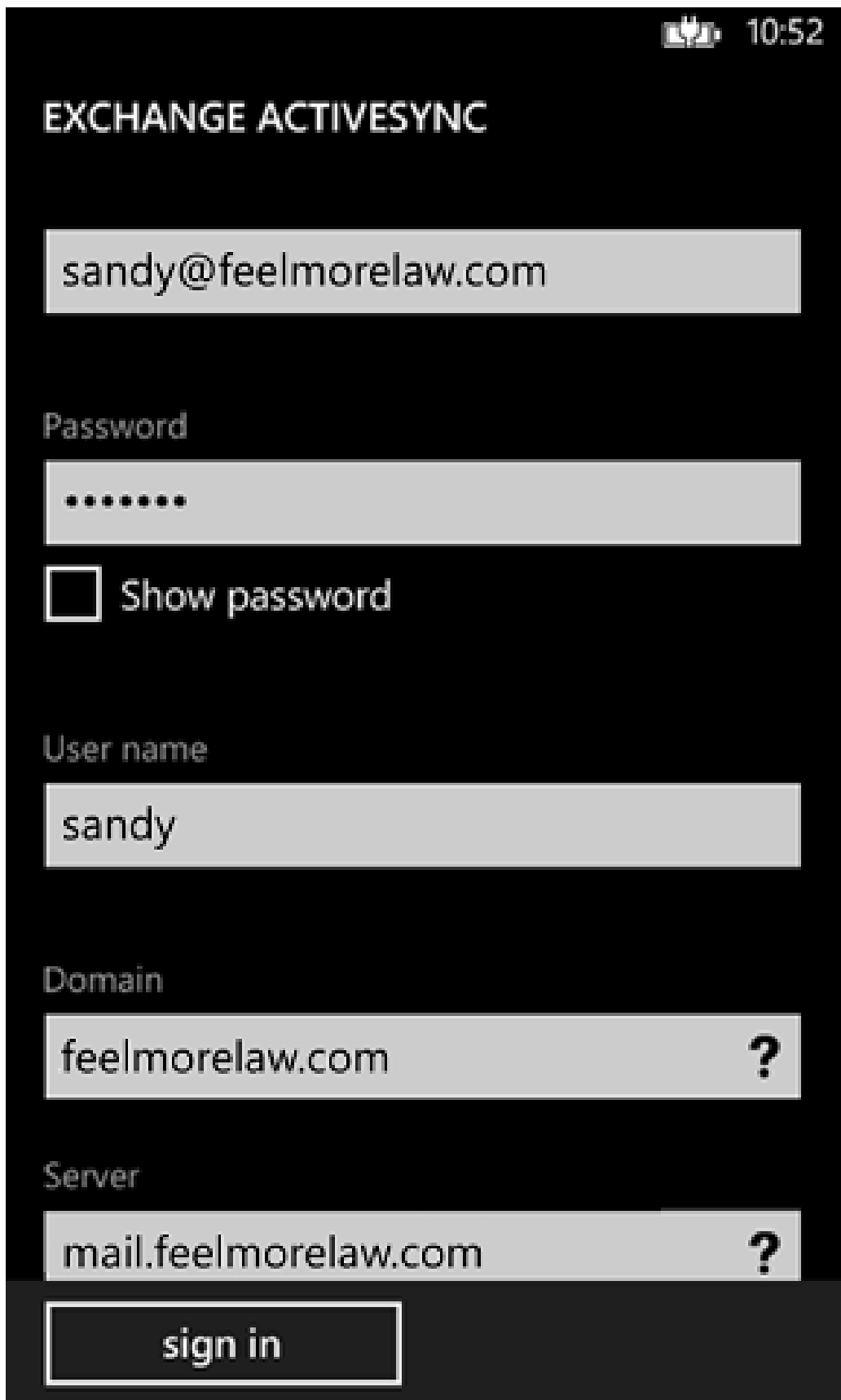




5. Select **Exchange ActiveSync** as the account type.



6. Enter the name of your domain (e.g. `feelmorelaw.com`) and server address (e.g. `mail.feelmorelaw.com`).



The image shows a screenshot of the Windows Phone 8 configuration screen for Exchange ActiveSync. The screen has a dark background with white text and light gray input fields. At the top right, there are icons for signal strength, Wi-Fi, and battery, along with the time 10:52. The title 'EXCHANGE ACTIVESYNC' is displayed in large white letters. Below the title, there are several input fields: 'sandy@feelmorelaw.com' in the top field, a password field with seven dots, a 'Show password' checkbox which is unchecked, 'sandy' in the 'User name' field, 'feelmorelaw.com' in the 'Domain' field with a question mark icon to its right, and 'mail.feelmorelaw.com' in the 'Server' field with a question mark icon to its right. At the bottom, there is a 'sign in' button with a white border.

EXCHANGE ACTIVESYNC

sandy@feelmorelaw.com

Password

.....

Show password

User name

sandy

Domain

feelmorelaw.com ?

Server

mail.feelmorelaw.com ?

sign in

7. Click **Sign in**.



If you are using a self-signed SSL certificate, you will receive an *Untrusted Certificate* warning. Click *continue* to add the account. To avoid this warning, install a signed SSL certificate on the Kerio Connect server. For details, refer to [Configuring SSL certificates in Kerio Connect](#).

# Installing Kerio Outlook Connector

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## Downloading Kerio Outlook Connector (Offline Edition)

For supported versions of operating systems and Microsoft Outlook, visit [Kerio Connect product pages](#).

To download the installation package, follow these steps:

1. Open the **Integration with Windows** page in your browser:
  - on the Kerio Connect client login page, click on the **Integration with Windows** link, or
  - click your name in Kerio Connect client and select **Integration with Windows**.



2. Click on **Download Kerio Outlook Connector**.

## Installing Kerio Outlook Connector (Offline Edition)



Before you install **Kerio Outlook Connector (Offline Edition)**, install and run at least once the **MS Outlook** application.

A standard installation wizard is used to install Kerio Outlook Connector (Offline Edition).

After the installation, you must [create a profile](#) for each user.

### Switching from the online version to the offline version of the Kerio Outlook Connector

Kerio Outlook Connector (Offline Edition) includes a special utility which [converts old profiles to new profiles](#).

### Upgrading Kerio Outlook Connector

If the administrator has turned on [automatic updates](#), MS Outlook will check for new versions automatically upon each startup.

If a new version is available, we recommend to update Kerio Outlook Connector.

Read article [Kerio Updater Service installation](#) for information on how Kerio Technologies has improved the upgrade process.

### Upgrading Microsoft Outlook

When you upgrade or downgrade MS Outlook, you must reinstall Kerio Outlook Connector manually.

# Creating profiles in MS Outlook

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## About profiles

After [installing](#) Kerio Outlook Connector (Offline Edition), or KOFF, you must create user profiles before using Microsoft Outlook.

A single Kerio Outlook Connector account is allowed for each profile.



If you install KOFF on a computer with Kerio Outlook Connector, you can [convert old profiles to new ones](#).

If you are switching to Kerio Connect from another mailserver (e.g. Exchange), you must create new profiles in MS Outlook.

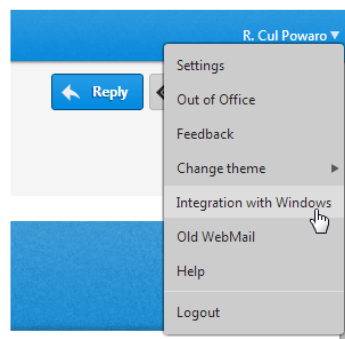
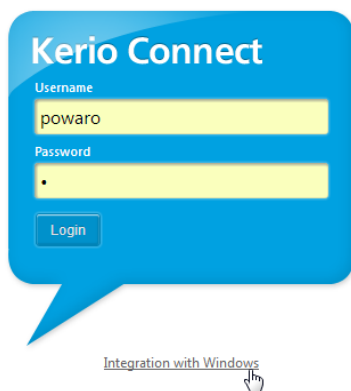
## Creating user profiles

You can create profiles automatically or manually.

### *Automatic configuration*

Kerio Connect has a special tool for automatic configuration of your MS Outlook account.

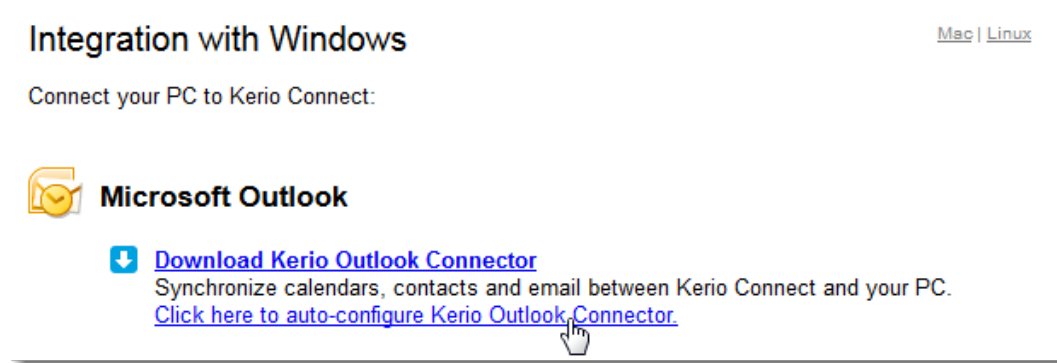
1. Open the **Integration with Windows** page in your browser:
  - on the Kerio Connect client login page, click on the **Integration with Windows** link, or
  - click your name in Kerio Connect client and select **Integration with Windows**.



2. Download the auto-configuration profile creator which is specific for each user account.

## Creating profiles in MS Outlook

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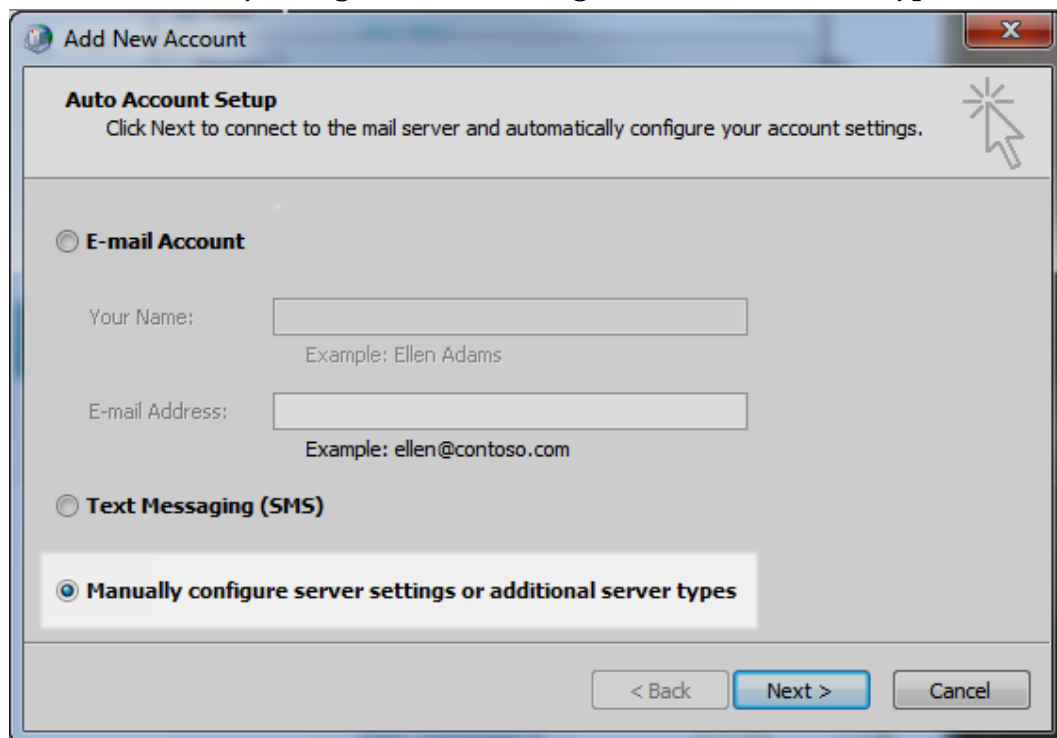
3. Run the profile creator tool.

The tool creates a Microsoft Outlook profile and synchronizes your Kerio Connect account to Microsoft Outlook.

### *Manual configuration*

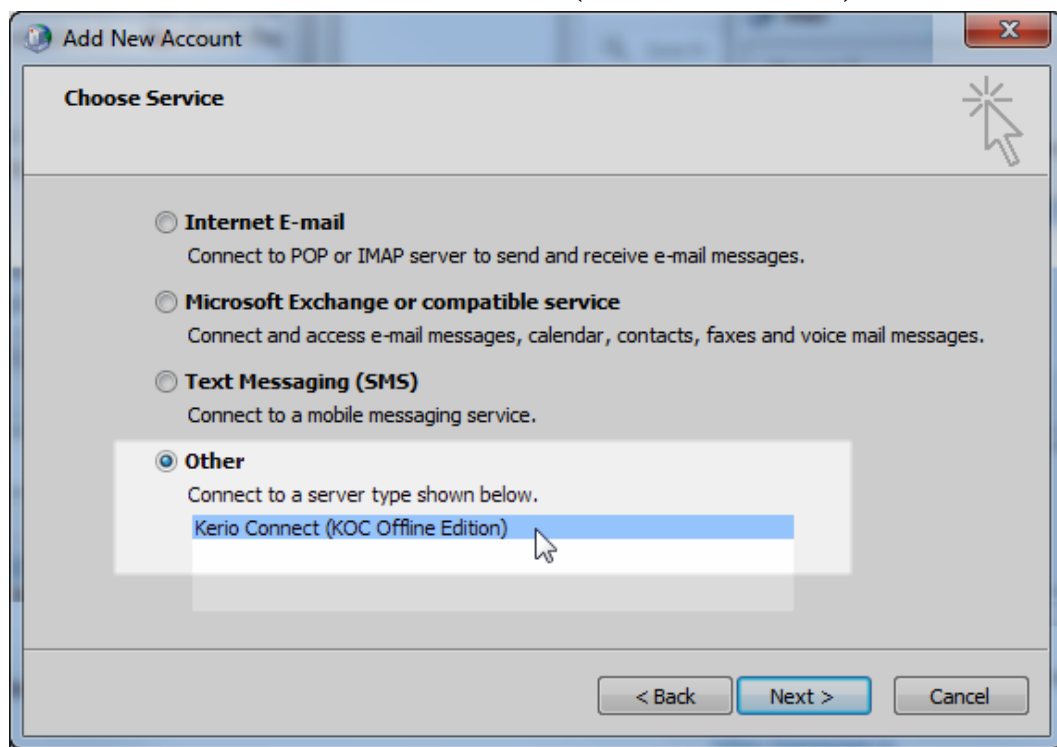
To create a profile manually, go to the computer's **Control Panel** → **Mail** and click **Show Profiles**:

1. Click **Add**, enter a name for the profile and confirm.
2. Select **Manually configure server settings or additional server types** and continue.





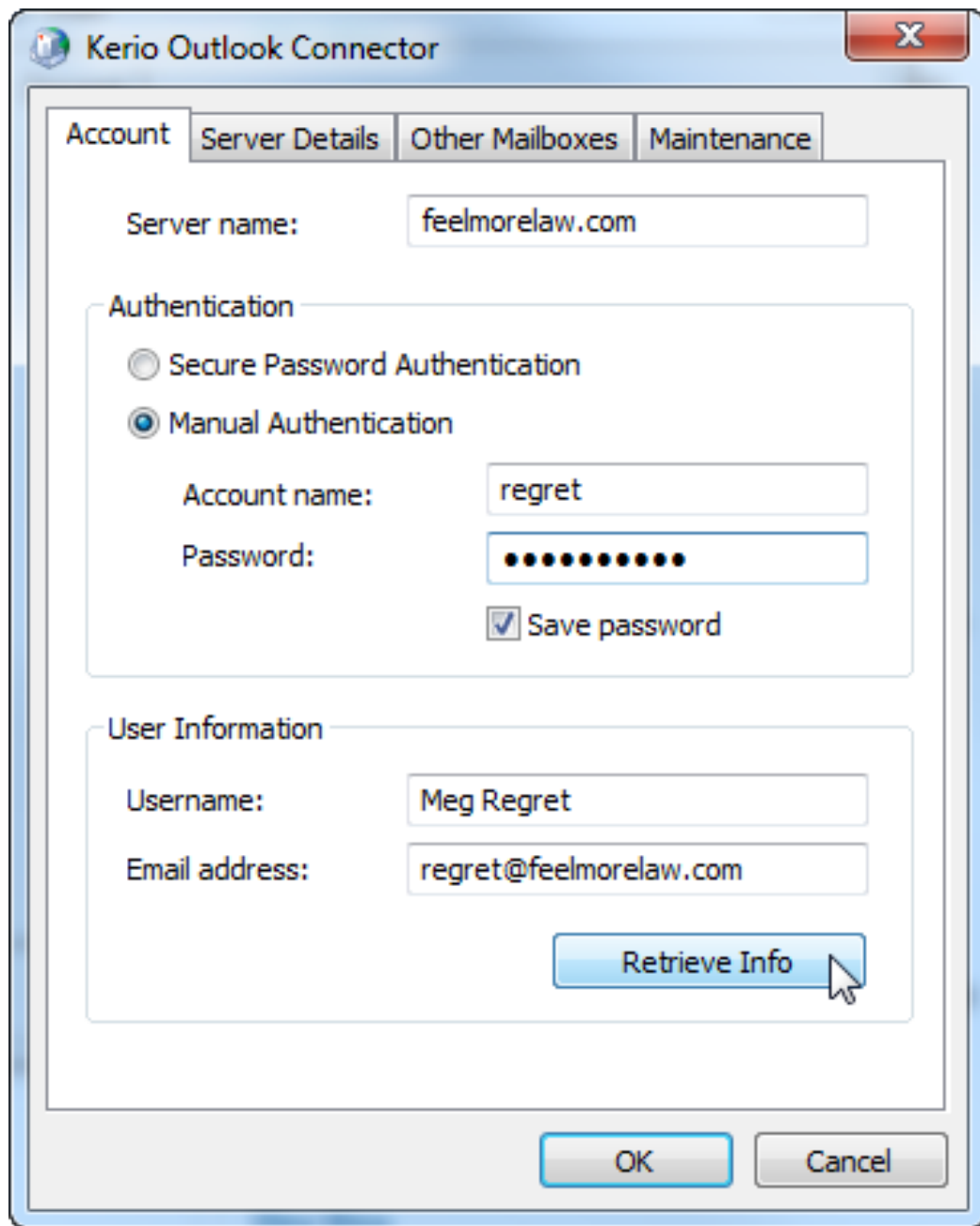
3. Select **Other** service and **Kerio Connect (KOC Offline Edition)** and continue.



4. Enter the server name (or IP address) of Kerio Connect, your account name (Kerio Connect username) and password.

If the user is not from the primary domain, the username must include the domain (e.g. `maison@feelmorelaw.com`).

To check the connection, click on **Retrieve Info** — if the data is correct, the dialog displays the name and email address of the user.



5. Confirm.

### Converting old profiles to profiles for Kerio Outlook Connector (Offline Edition)

1. Install [Kerio Outlook Connector \(Offline Edition\)](#).
2. Run **Start** → **All Programs** → **Kerio** → **Outlook Profile Conversion Utility** which converts all Kerio profiles to profiles for *Kerio Outlook Connector (Offline Edition)*.

### *One workstation is shared by multiple users*

Install KOFF only once and run the Outlook Profile Conversion Utility for each user.

### *Kerio Outlook Connector is installed without connection to Kerio Connect*

Run the Outlook Profile Conversion Utility.

To finish the conversion when you connect to the server, follow these steps for each Kerio profile:

1. In the profiles dialog (in **Control Panel** → **Mail**), select the Kerio profile and click on **Properties**.
2. Click on **User Accounts**.
3. On the following page, double-click on the Kerio account and confirm the settings.

Conversion to the Kerio Outlook Connector profile is finished automatically

# Synchronizing Microsoft Outlook with Kerio Connect

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## Online and offline modes

Kerio Outlook Connector supports both modes, online and offline:

### Online mode

is the standard MS Outlook mode which requires connection to Kerio Connect

### Offline mode

allows working with MS Outlook without connection to Kerio Connect

This requires all email, events, tasks, etc. are stored in the local message store on the client station. When you switch to online mode, all new messages, events and tasks are synchronized with the server's store automatically.

## About synchronization

Kerio Outlook Connect can synchronize any folder in Kerio Connect in one of the following modes:

- **full synchronization** of the folder
- **synchronization of header and message body in plain text** — with this option, attachments are not downloaded automatically

The default synchronization works as follows:

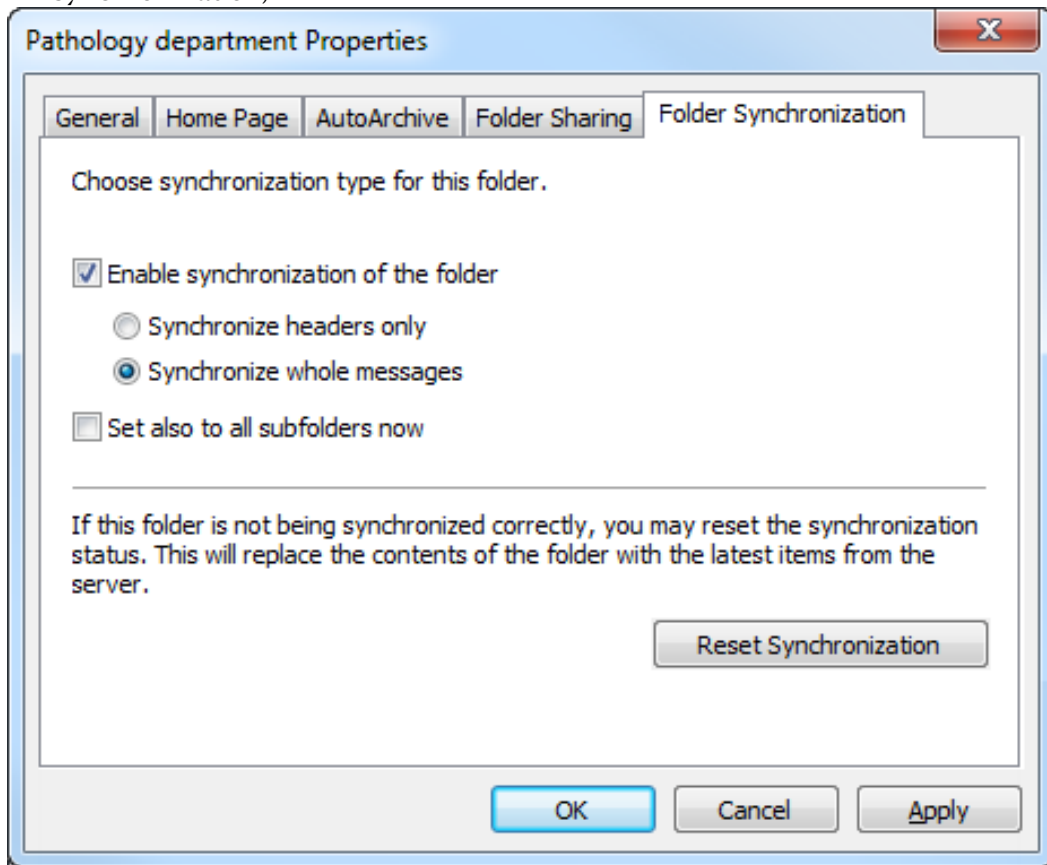
- Inbox — whole messages are synchronized.
- Other email folders — only message headers and body in plain text are synchronized.
- Events — whole events are synchronized.
- Contacts — whole contacts are synchronized.
- Tasks — whole tasks are synchronized.
- Notes — whole notes are synchronized.

Upon each startup of Microsoft Outlook, Kerio Outlook Connector synchronizes the currently opened folder first.

## Setting folder synchronization

To enable/disable synchronization and select a synchronization mode of individual folders, follow these steps:

1. Right-click a folder and select **Properties**.
2. On tab **Folder Synchronization**, select the synchronization mode (or enable/disable the synchronization).



3. Confirm the settings.



If you disable synchronization of a previously synchronized folder, all present items will remain synchronized.

## Solving synchronization conflicts

Synchronization conflict occurs when a message, event or any other item is changed both on the server and in Kerio Outlook Connector between synchronization.

If a conflict occurs during the synchronization:

- the item saved on the server overrules the item in Microsoft Outlook (Kerio Outlook Connector).
- you receive a special message with information about the conflict

The item from Microsoft Outlook is saved in a special folder called **Conflicts** (available only in MS Outlook). If you prefer to keep the item in MS Outlook, move it from the **Conflicts** folder and replace the synchronized item from the server to the original folder.