

User Manual

Syncronym Manager

Welcome to Syncronym

This setup manual is designed for the Administrative User that will be setting up the synchronized feeds (Syncs) for contacts, custom fields and mailing lists to PoliteMail users. It provides a basic overview of the various methods to add Syncs from multiple data sources into Syncronym.

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What is Syncronym

Syncronym enables you to import data into PoliteMail databases from various data sources and update the data nightly. When you add a Sync, Syncronym will update your PoliteMail database with the information from your data source based on your Sync settings. This allows PoliteMail to automatically update your data with a one-time only setup.

Syncs are added and managed using the Syncronym Manager application, which can be found in the PoliteMail software folder.

PoliteMail Dedicated Cloud Service Architecture with Syncronym







PoliteMail Hybrid Exchange/O365 with Syncronym

Exploring the Syncronym Manager

When you first open the Syncronym Manager you will see 4 empty tabs, one for each of the different Sync types.

File View	Tools He	elp				
Contact Sync	s Field Syncs	List Syncs	EWS Sync Grid View			
Name	SyncFree	luency	LastSync	SyncStatus	Enabled	DeleteRow

Contact Sync	This Sync should be used to add and update contacts in the PoliteMail database.
Field Sync	This Sync allows you to set up custom fields and updates to these fields. You will need to provide a name for the Field sync, create the Custom Field, and map the Value to your Source Columns.
List Sync	This Sync should be used to add mailing distribution lists and update Contact-List relationships. When creating a List Sync, you are required to map the Email, List Name, and List ID.
EWS Sync	Exchange Web Services (EWS) Sync This Sync should be used to update the cached Exchange list membership Note: For more information on EWS for Exchange, please see this <u>link</u>



Methods for adding new Syncs with the Syncronym Manager

When adding Syncs within the Syncronym Manager you will have the option to choose a Data Source from a Text File, Excel File or Other Data sources, such as through an SQL database.

3			Syncronym M	Manager			>
File	View Tools Help Edit Connection String						
	Add Contact Sync	•	From Text	Ctrl+F			
	Add Field Sync Add List Sync		From Excel From Other Data Source	Ctrl+E Ctrl+O	Status	Enabled	DeleteRow
	Sync	•					

Adding a Sync from an SQL Database

- 1. Select the type of Sync you would like to add (Contact, Field, List) and select Other Data Source
- 2. You will be prompted with a Data Source Connection Dialog, select Microsoft SQL Server

lata <u>s</u> ource:	Description
Microsoft Access Database File	Lise this selection to connect to Microsoft
Microsoft ODBC Data Source	SQL Server 2005 or above using the .NET
Microsoft SQL Server Database File Dracle Database <other></other>	Framework Data Provider for SQL Server.

3. Select or type in your SQL Server and select your database from the drop down. Then enter any necessary **credentials** to connect to the SQL Server

Microsoft SQL Sen	ver (SqlClient)	Change
Server name:		
	v	Refresh
Log on to the ser	ver	
Use Windows	a Authentication	
O Use SQL Ser	ver Authentication	
User name:		
Deserved		
r assivutu	Concernant and	
	C save my paseword	
Connect to a data	abase	
	er a database name:	
 Select or entr 		
Select or enter		
Select or enter	hase file	
Select or enter Attach a data	base file:	Browse
Select or enter Attach a data Logical name	base file:	Browse
Select or enter Attach a data Logical name	base file:	Browse
Select or entr Attach a data Logical name	base file:	Browse.

4. Enter the SQL Query you would like to run against the database. A sample query is provided to show the general format for the selection you choose.



- 5. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the Sync. The Source Column will be read in from your Data Source while the Destination Column will map to a PoliteMail database.
- 6. If you need to edit the Query or Connection String, make your changes and click **Refresh** and it will reload the Edit Sync List window with the new connection information and run the new query against your database.
- 7. Once you have completed configuring the sync select Save



Adding a Sync from an Active Directory

- 1. Select the type of Sync you would like to add (Contact, Field, List) and select Other Data Source
- 2. In the Data Source Connection Dialog select **other** and in the Data Provider drop down select **.NET Framework Data Provider for OLE DB**

Microsoft SQL Server Database File Oracle Database <other> Data provider:</other>	
.NET Framework Data Provider for OLE DB	×

3. In the OLD DB Provider drop down select **OLE DB Provider for Microsoft Directory Services** and enter any necessary **credentials** to connect to the Active Directory

NET Communda Da	
INCT Framework Da	Change.
LE DB Provider:	
OLE DB Provider fo	r Microsoft Directory Services V Data Links
Enter a server or fil	le name
Server or file name	B:
Location:	
Log on to the serve	er
O Use Windows	NT Integrated Security
• Use a specific	user name and password:
• Use a specific User name:	user name and password:
Use a specific User name: Password:	user name and password:
 Use a specific User name: Password: Blank pass 	user name and password:
 Use a specific User name: Password: Blank pass 	user name and password:
 Use a specific User name: Password: Blank pass 	user name and password:
 Use a specific User name: Password: Blank pass nitial catalog: 	user name and password:
 Use a specific User name: Password: Blank pass hitial catalog: 	user name and password:



- 4. Enter the LDAP Query you would like to run against the active directory
- 5. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the sync.
- 6. If you need to edit the Query or Connection String, make your changes and click **Refresh** and it will reload the Edit Sync List window with the new connection information and run the new query against your database.
- 7. Once you have completed configuring the sync select **Save**



Adding a Sync from a Text File

1. Select the type of Sync you would like to add (Contact, Field, List) and select From Text

÷.			Syncronym N	Nanager			- 0 x
File	View Tools Help Edit Connection String Add Contact Sync		DAIS Sume Criel View				
	Add Field Sync	Field Sync		Ctrl+ Alt+E	tus	Enabled	DeleteRow
	Sync	•	From Excel From Other Data Source	Ctrl+Alt+E Ctrl+Alt+O			

2. Select the folder where the text file is located

Browse For Folder	
elect Folder where the Imported File is located	
E Desktop	
Administrator	
🛿 📜 This PC	
> 🛜 Libraries	
🕅 Network	
Control Panel	
Recycle Bin	

3. Enter the query to select the data from your text file (or all text files)



- 4. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the sync.
- 5. If you need to edit the Query or Connection String, make your changes and click **Refresh** and it will reload the Edit Sync List window with the new connection information and run the new query against your database.
- 6. Once you have completed configuring the Sync select **Save**



Adding a Sync from an Excel File

1. Select the type of Sync you would like to add (Contact, Field, List) and select From Excel

ş			Syncronym M	/lanager			×
File Vi	iew Tools	Help					
Edit	Connection	String					
Add	Contact Syn	c 🕨	From Text	Ctrl+F			
Add	Field Sync	•	From Excel	Ctrl+E		1	
Add	List Sync	•	From Other Data Source	Ctrl+O	Status	Enabled	DeleteRow
Syn	c	•					

2. Select the File that contains the data that needs to be imported

🖲 🗉 🛧 🚺 🕨	This PC Documents			~ C	Search Documents	۶
Organize 🔻 New fold	er				8== • [
☆ Favorites	Name	Date modified	Туре	Size		
E Desktop	LERTS	4/26/2016 1:14 PM	File folder			
🐌 Downloads	January Fiddler2	4/27/2016 5:21 PM	File folder			
💹 Recent places	🎍 New folder	5/3/2016 9:49 AM	File folder			
🖳 This PC	PMSetup	6/1/2016 4:12 PM	File folder			
	PMTestApplications	4/15/2016 10:40 AM	File folder			
📕 This PC	Projects	5/3/2016 11:41 AM	File folder			
hesktop	SQL Server Management Studio	5/23/2016 3:32 PM	File folder			
Documents	J TmpFiles	5/9/2016 11:25 AM	File folder			
🚺 Downloads	Visual Studio 2010	4/11/2016 2:02 PM	File folder			
Music Pictures	UserImportExcel.xls	4/28/2016 2:05 PM	XLS File	27 KB		

3. Enter the query to select data from the Excel File. (Note: Queries against Excel files are searched from the Sheet name. See example query)

3		Ente	er SQL (Query			x
Entert	he SQL a	uery to b	e sync	onized	to a P	oliteMai	l list
SAMPL	E: SELECT	* FROM [S	SHEET15]			

- 4. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the Sync.
- 5. If you need to edit the Query or Connection String, make your changes and click **Refresh** and it will reload the Edit Sync List window with the new connection information and run the new query against your database.
- 6. Once you have completed configuring the Sync select **Save**



Syncing the Data

Once you have finished creating the Sync(s) you can manually schedule the Sync to run or wait for it to automatically sync based on the Sync settings. When the difference from the Last Sync to today is longer than the Sync Frequency the Sync Status is **Pending** and the last Sync is displayed in orange. To manually sync, select Sync from the File Menu Option.

Under the Sync Menu Item, you have the option to sync all the Syncs across the three tabs, sync all the Syncs in one specific tab, or sync only the selected row in a tab. When you finish syncing, the Last Sync and Sync Status get updated to display which Syncs are up to date.

Syncronym Manager – Main Overview

File View	Tools He	elp				
Contact Syncs	Field Syncs	List Syncs	EWS Sync Grid View			
Name	SyncFreq	uency	LastSync	SyncStatus	Enabled	DeleteRow

File	Choose what Syncs you want to add and the data source
Menu	Mark the Syncs to be picked up by the service
View	Refresh the view
Menu	Clear EWS Cache
Tools	Reset Syncronym user
Menu	Setup EWS Credentials for EWS Caching
Help	About Syncronym
Player	Start, Pause, Stop or Restart Syncronym service
	Note: The service picks up and runs the Sync. so when the service is not running the
	Syncs will not complete



SyncCompleted – Sync has been completedStatusNeeds Sync – Not picked up by the service yetPending – Has been picked up by the service and is in the queueSyncing – Has been picked up by the service and is in process

Contact Edit Sync List – Overview

		Edit Syn	c List	
Sync Name				
PoliteMail List	PoliteMa	ilDefault-	v 1	Minimum List Size:
Frequency (Hours)	24.00		Pacific Daylight	Time 🔽 Enabled
	🖲 Use Fi	irst Duplicate Entry ODr	op Duplicate Entries	
Description				
Data Provider	SqlClient			
Connection String	Data So Securit	ource=SERVERNAME;Initia ty=True	1 Catalog=DATABASE;I	Integrated
Owner	All Users			
Query Editor SELECT * FRO	M AllEmploy	vees		
Query Editor SELECT * FRO	M AllEmploy	vees		
Query Editor SELECT * FRO	M AllEmploy	/ees		
Query Editor SELECT * FRO	M AllEmploy	vees Destination Column	Auto Group	Reports To
 Query Editor SELECT * FRO Source C ID 	M AllEmploy	vees Destination Column	Auto Group	Reports To
Query Editor SELECT * FRO. Source C D First	M AllEmploy	Vees Destination Column	Auto Group	Reports To
Query Editor SELECT * FRO Source C ID First Last	M AllEmploy	Destination Column	Auto Group	Reports To
 Query Editor SELECT * FRO Source C ID First Last Email 	M AllEmploy	Vees Destination Column	Auto Group	Reports To
 Query Editor SELECT * FRO Source C ID First Last Email Division 	M AllEmploy	Vees Destination Column	Auto Group	Reports To
 Query Editor SELECT * FRO Source C ID First Last Email Division Department 	M AllEmploy	Vees Destination Column	Auto Group	Reports To
Query Editor SELECT * FRO Source C ID First Last Email Division Department	M AllEmploy	Vees Destination Column	Auto Group	Reports To

Sync Name The name of the Sync being created

 PoliteMail
 The PoliteMail list that the Sync will add contacts to

 List
 Description



Minimum List Size	Minimum size that reports will auto generate for a list An empty value will disable lists from being created
Frequency	Set the frequency for the Sync
Duplicate Entries	Determines behavior for duplicate entries
Description Section	Auto fills data from previous setup menus that can be edited or modified.
Mapping Chart	Displays mapping and custom attributes
Auto Group	Produces lists of contacts with the same custom value in the mapped column Note: Can only be selected for values mapped to a custom field
Reports To	Produces a hierarchy of emails for the contacts that report to a manager Note: Can only be selected for values mapped to a custom field

Custom Field	l Sync –	Preview	Custom	Fields	Overview
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50 million - 10 mi	Preview	v Custom Fields	_ D X
Field Sync Name:	FunctionSync		
Frequency (Hours)	24.00 🗢 12:00 AM	🕒 🗘 Pacific Daylight Time 🔽	Enabled
Data Provider	ODBC		¥
Connection String	Driver={Microsoft Excel Dr	river (*.xls)};Dbq=C:\USERS\FILEP	ATHUSER\Document
Query Editor			
SELECT * FROM	1 [Function\$]		
<	Ш		>
Select a custom fie	eld you would like to replace Custo	om20	~
	201100		92
Field Name:	Function		~
	Source Column	Destination Colum	าท
Function	Source Column	Destination Colum Field Value	าท
Function	Source Column	Destination Colun Field Value Display Value	n
Function Description Status	Source Column	Destination Colum Field Value Display Value	ın
Function Description Status	Source Column	Destination Colum Field Value Display Value	nn
Function Description Status Audit Tax Services	Source Column	Destination Colum Field Value Display Value	IN
Function Description Status Audit Tax Services Admin Services Field	Source Column	Destination Colum Field Value Display Value	n
Function Function Status Audit Tax Services Admin Services Field	Source Column	Destination Colum Field Value Display Value	nn
Function Description Status Audit Tax Services Admin Services Field NBPG	Source Column	Destination Colum Field Value Display Value	ın
Function Function Constraints Function Function Status Audit Tax Services Admin Services Field NBPG Advisory	Source Column	Destination Colum Field Value Display Value	nn
Function Function Constraints Function Function Status Audit Tax Services Admin Services Field NBPG Advisory	Source Column	Destination Colum Field Value Display Value	nn
Function Function Status Audit Tax Services Admin Services Field NBPG Advisory	Source Column	Destination Colum Field Value Display Value	

Field Sync Name	The name of the Sync being created
Frequency	Set the frequency for the Sync
Description Section	Auto fills data from previous setup menus that can be edited or modified
Custom Field	The custom field that the Sync will utilize

Field Name	The new unique name for the field Note: Cannot match any other standard or custom field. The Field Value will be used to map to this custom value by an ID instead of the value's text. Example would be Field Value: NH, Display Value: New Hampshire. This allows the user to map contacts and their custom values on Field Value instead of the Custom Value's display name
Mapping Chart	Displays mapping and destination attributes
Custom Value Display	Displays all the Custom Values from the data source that will be imported

Suma Nama:	ListSupc				
Sync Name.			Ex Davidia ht Time		
riequency (Hours)	24,00 - 12:00 AN		lic Daylight Time	Enabled	
Data Provider	ODBC				
Connection String	Driver={Microsof	t Text Driver	• (*.txt; *.csv)	};Dbq=C:\Users	VOURFILEPAT
Query Editor					
	0				
<	II Source Column			Destination Colur	nn
< IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	II Source Column		List Name	Destination Colur	nn
< I List Name Email	II Source Column		List Name Email	Destination Colur	າກ
< IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	II Source Column		List Name Email	Destination Colur	nn

Contact List Sync – User Relationship Import Overview

Field Sync Name	The name of the Sync being created
Frequency	Set the frequency for the Sync
Data Section	Auto fills data from previous setup menus that can be edited or modified
Custom Field	The custom field that the Sync will utilize





EWSCache Sync Overview

File	View	Tools Help	
•	R	lefresh	
Conto	0	Clear EWS Cache	EWS Sume Grid View
Conta	Cr syncs	Tricia synca Lisc syn	es Evvs sync ond viev
Conta	Cr syncs	Their Synes Felse Syn	
File	View	Tools Help	Exercised and view
File	View	Tools Help Reset PeopleSyr	ic User

Clear EWS Cache	Deletes the EWS Cached data from the database
Setup EWS Credentials	After initial setup, this can be used to re-enter or change credentials

Syncronym will update List Memberships using EWS if a user has setup EWS. If the list has been used, sent to, the cache file will be set to Auto Update and every 24 hours the members will be updated using the EWS Credentials. If the list was just expanded using EWS (ex. Get Recipient Count) it will cache the data but won't Auto Update. If the list is expanded using EWS Server the Owner will be set to "Everyone", if the list is expanded using EWS Client the Owner will be the user that expanded the list. If the membership update errors 5 or more times, the list gets Auto Update set to false.

On PoliteMail, if there is cached data for the list and the user is using EWS the cached data will be used instead of expanding the data on send because that can take a long time.

Support

If you are experiencing technical issues with your PoliteMail account, please reach out to our technical support team.

Click on the **Request Support** icon in the PoliteMail tab in Outlook.

This will generate an email with your account information and an error log for our technical support team to use in troubleshooting the issue. Enter a brief synopsis of the issue you are experiencing and screenshots if applicable.

Once you send the message, a case will be created for your support request and our support team will respond.

You can also reach out to our directly via:

Email: serversupport@politemail.com

Phone: 603-610-6111 ext. 3

SEND / RECEIVE	FOLDER VIEW	POLITEMAIL	
ate	(?) (2) Help Request Support Help	Process Outbox Process Undeliverables	s Server el Connection In Options
	<	All Unread	
		!公 🗅 🖉 FROM	2
racking Clipboard 5 Ba	sic Text 5	Include Zoom	Office Add-ins
end Subject PMv4 Support Req	uest:		
Attached error log.err (7	KB)		
fype your issue or support reque- line above. Local Time: 12/2/2015 4:56:01 PM Eastern : Account Email: Iillie.hua@politemail.com Send via PoliteMail Server: False PoliteMail Server: comms.pmail4.com Use SSL True	st here - if this is a critic Standard Time	al issue please copy <mark>CRITICAL:</mark> in	nto the subject