PoliteMail®

User Manual

Syncronym Manager

Welcome to Syncronym

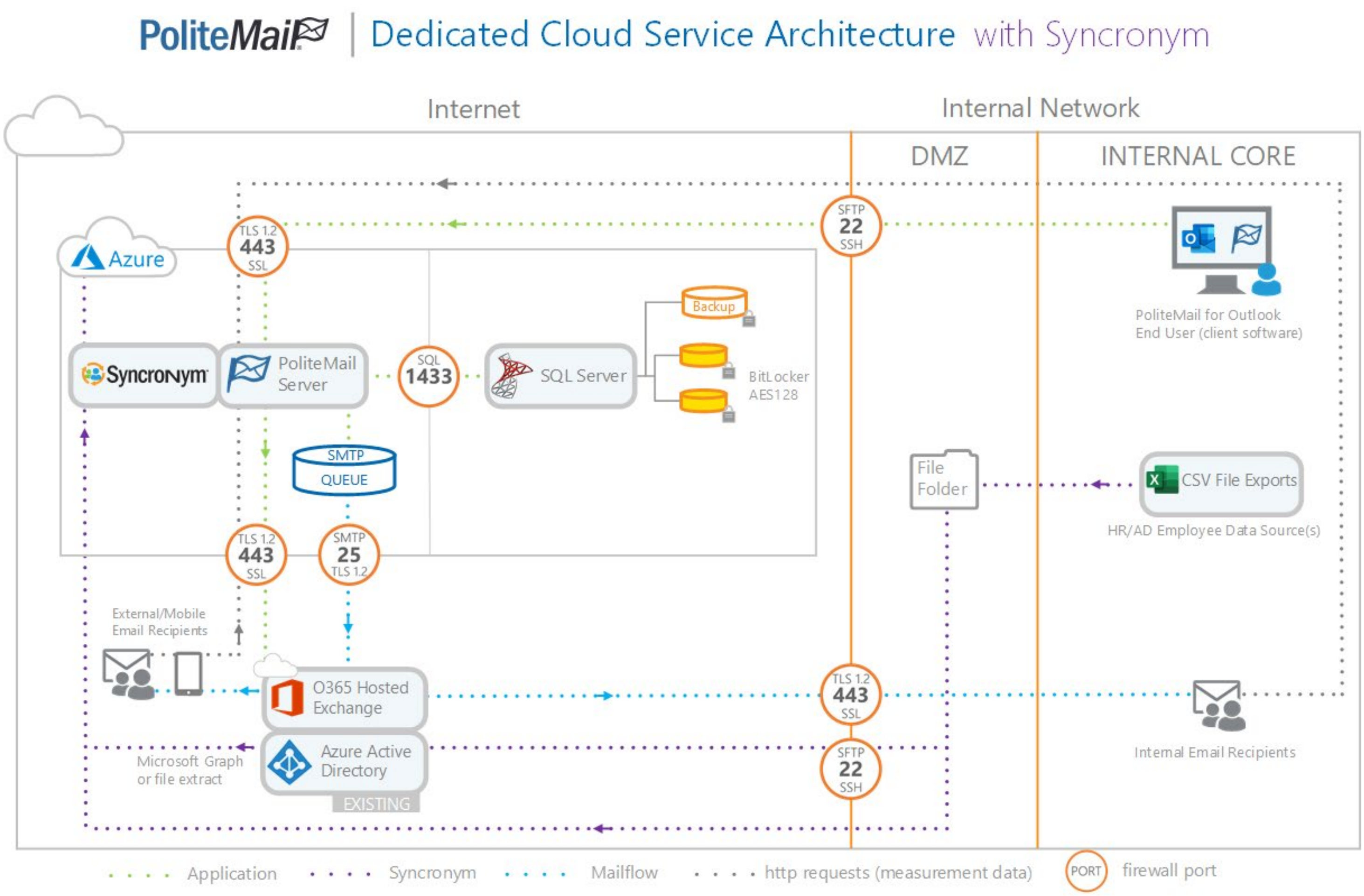
This setup manual is designed for the Administrative User that will be setting up the synchronized feeds (Syncs) for contacts, custom fields and mailing lists to PoliteMail users. It provides a basic overview of the various methods to add Syncs from multiple data sources into Syncronym.

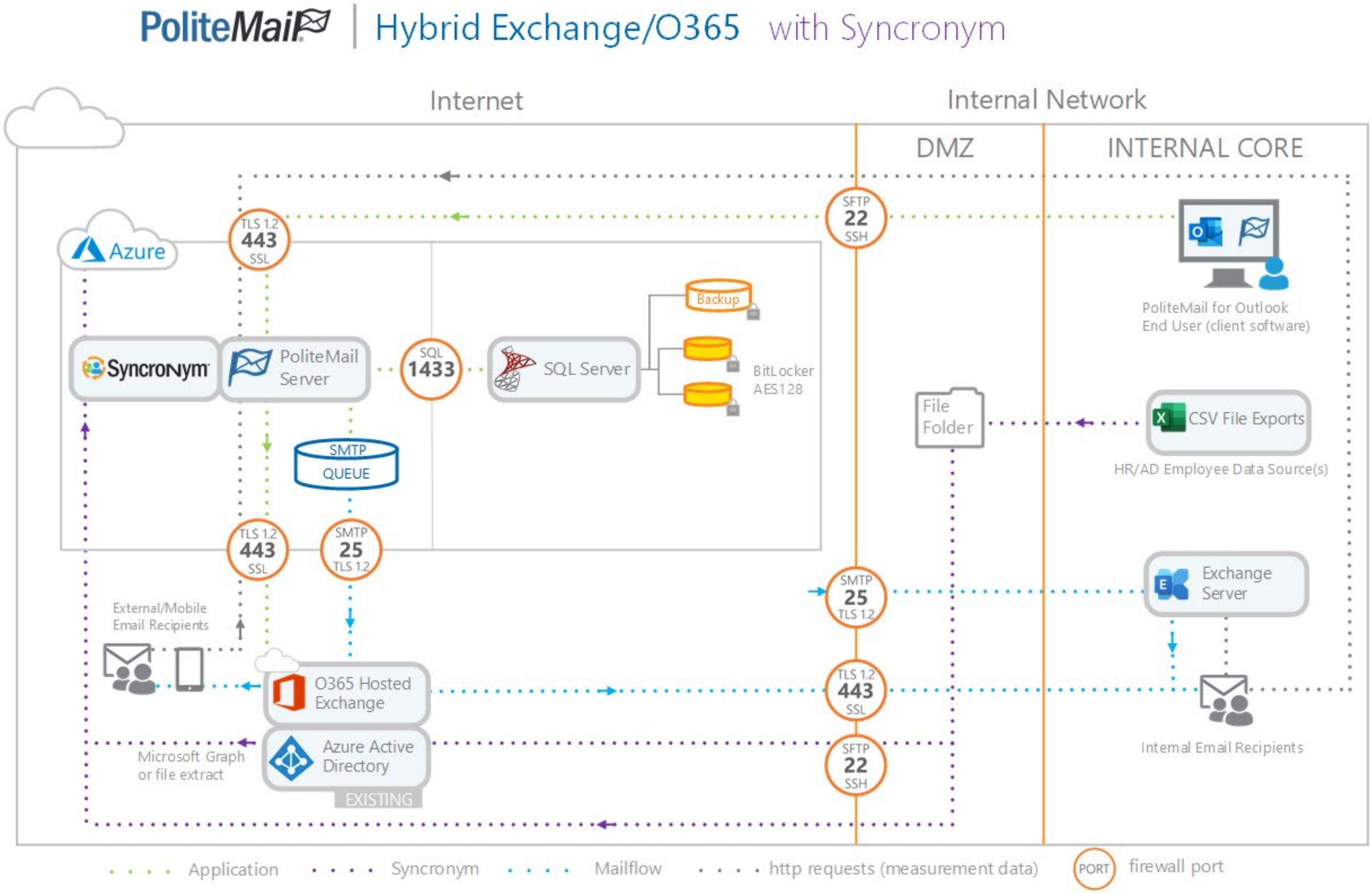
Contents

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.

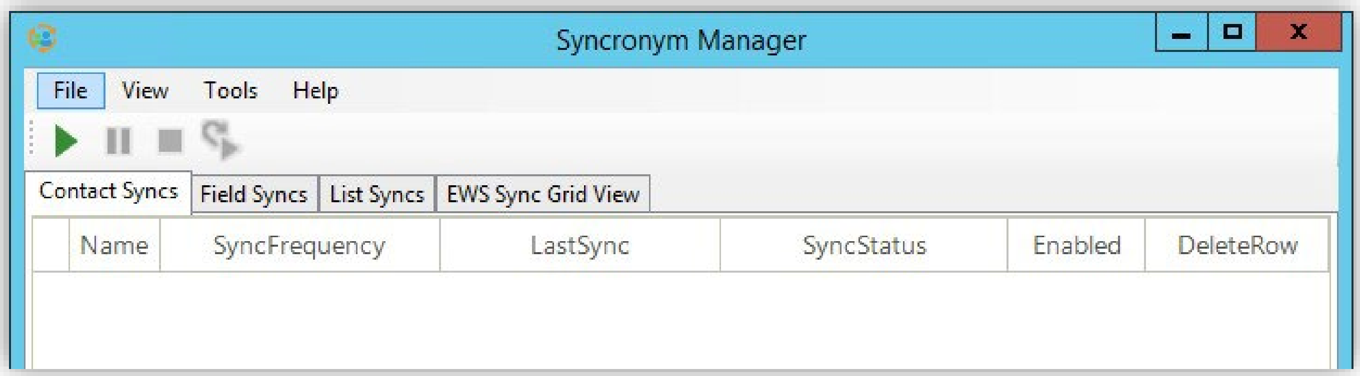
Syncs are added and managed using the Syncronym Manager application, which can be found in the PoliteMail software folder.




PoliteMail | Hybrid Exchange/O365 with Syncronym
Internet
Internal Network
DMZ
INTERNAL CORE
Azure
TLS 1.2 443 SSL
SFTP 22 SSH
PoliteMail for Outlook End User (client software)
Syncronym
PoliteMail Server
SQL 1433
SQL Server
Backup
BitLocker AES128
File Folder
CSV File Exports
HR/AD Employee Data Source(s)
SMTP QUEUE
SMTP 25 TLS 1.2
Exchange Server
External/Mobile Email Recipients
O365 Hosted Exchange
Azure Active Directory
EXISTING
Microsoft Graph or file extract
Internal Email Recipients
Application
Syncronym
Mailflow
http requests (measurement data)
PORT
firewall port

Exploring the Syncronym Manager

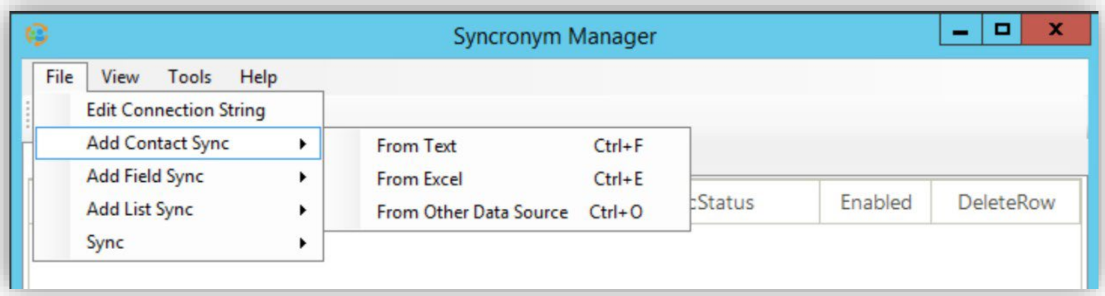
When you first open the Syncronym Manager you will see 4 empty tabs, one for each of the different Sync types.



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 link

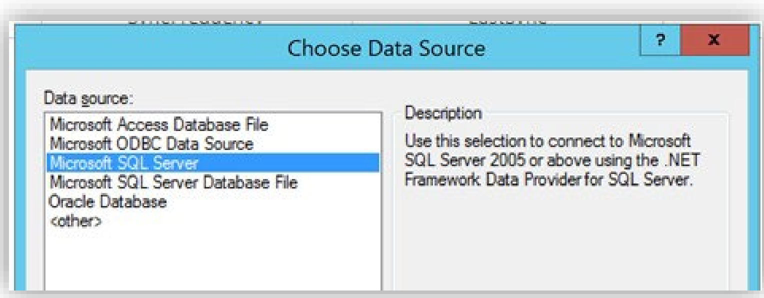
Methods for adding new Syncs with the Syncronym Manager

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.

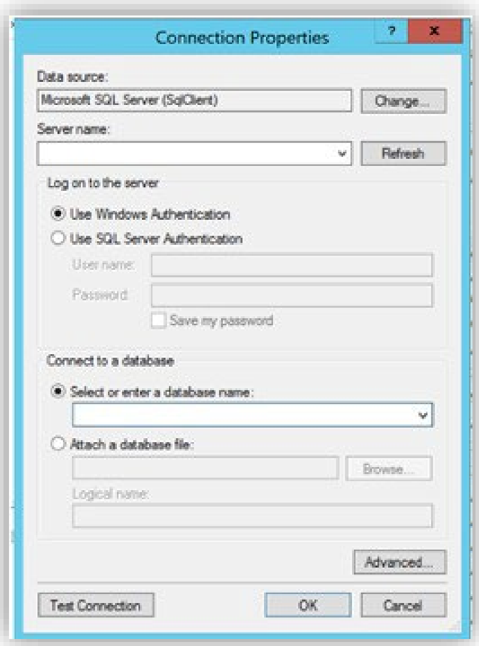


Adding a Sync from an SQL Database

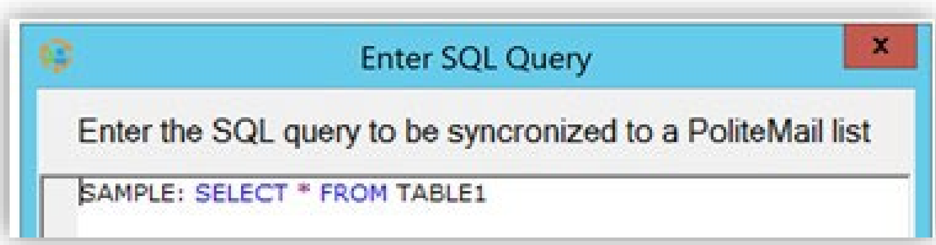
1. Select the type of Sync you would like to add (Contact, Field, List) and select Other Data Source
2. You will be prompted with a Data Source Connection Dialog, select **Microsoft SQL Server**



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



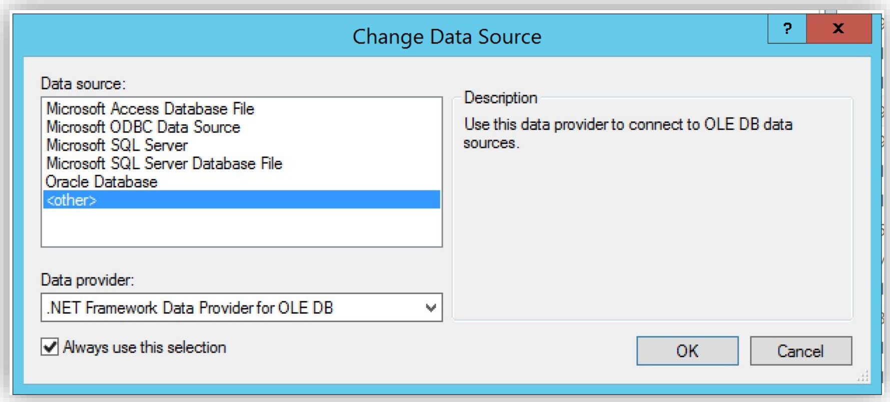
4. Enter the SQL Query you would like to run against the database. A sample query is provided to show the general format for the selection you choose.



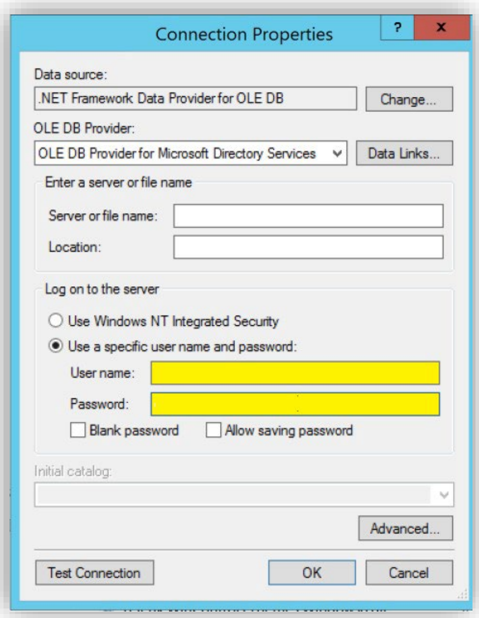
5. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the Sync. The Source Column will be read in from your Data Source while the Destination Column will 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**

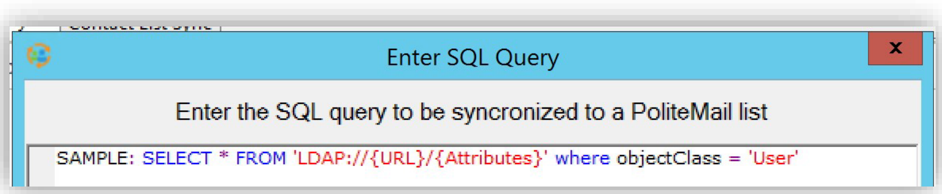
Adding a Sync from an Active Directory

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**



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

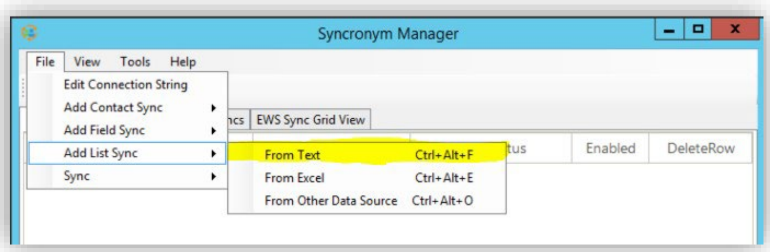




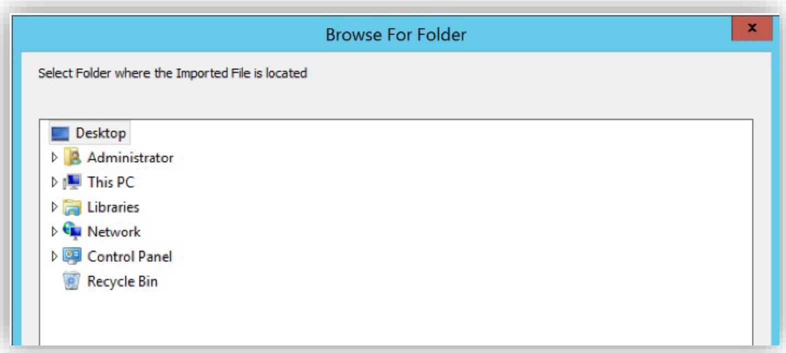
4. Enter the LDAP Query you would like to run against the active directory
5. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the sync.
6. If you need 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

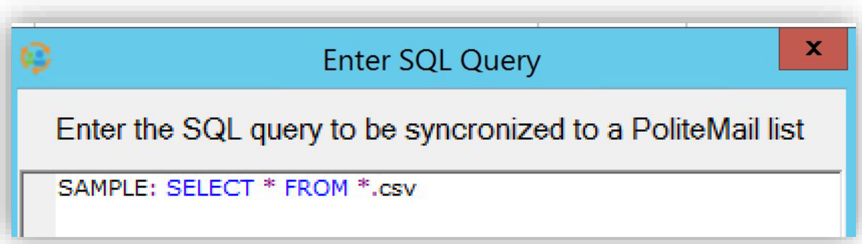
1. Select the type of Sync you would like to add (Contact, Field, List) and select **From Text**



2. Select the folder where the text file is located



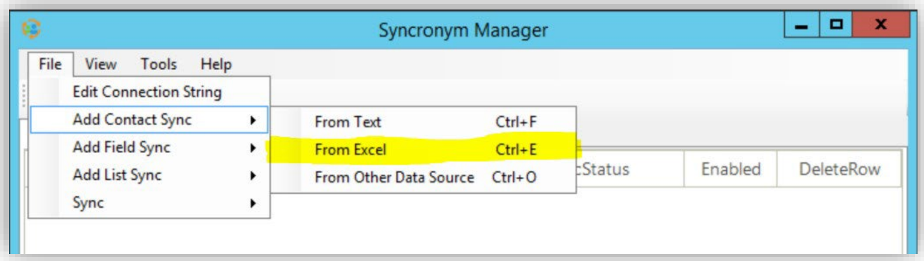
3. Enter the query to select the data from your text file (or all text files)



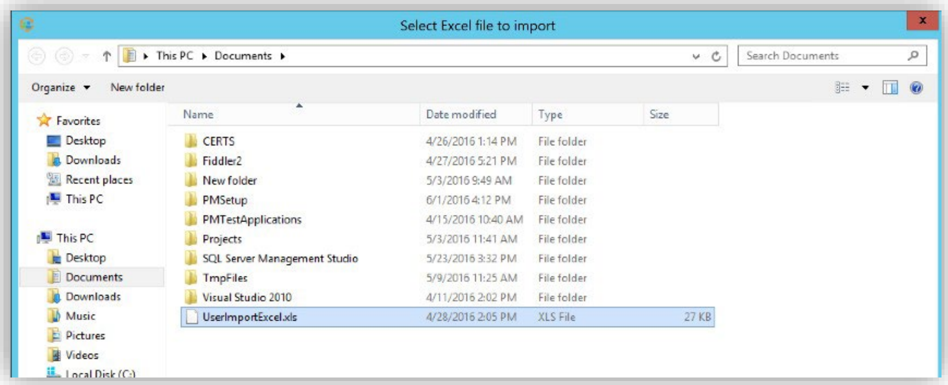
4. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the sync.
5. If you need to edit the Query or Connection String, make your changes and click **Refresh** 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

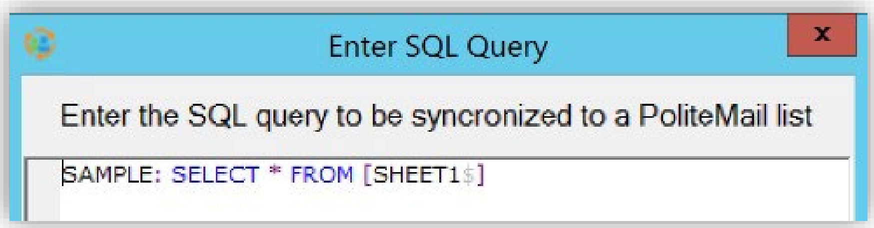
1. Select the type of Sync you would like to add (Contact, Field, List) and select **From Excel**



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



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)



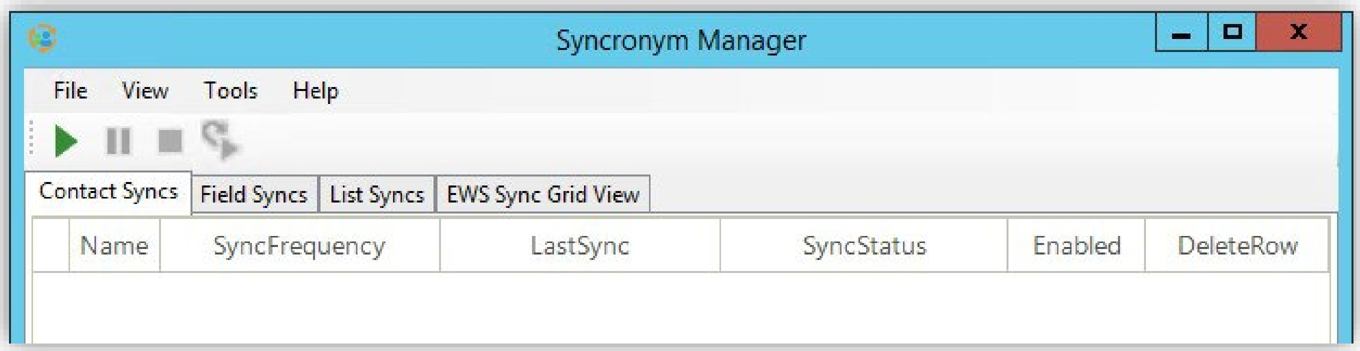
4. A Sync window will appear, edit the sync data and map the Database columns (Source Columns) to the Syncronym Destination Columns. This will determine which columns get imported for each field during the Sync.
5. If you need to edit the Query or Connection String, make your changes and click **Refresh** 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.

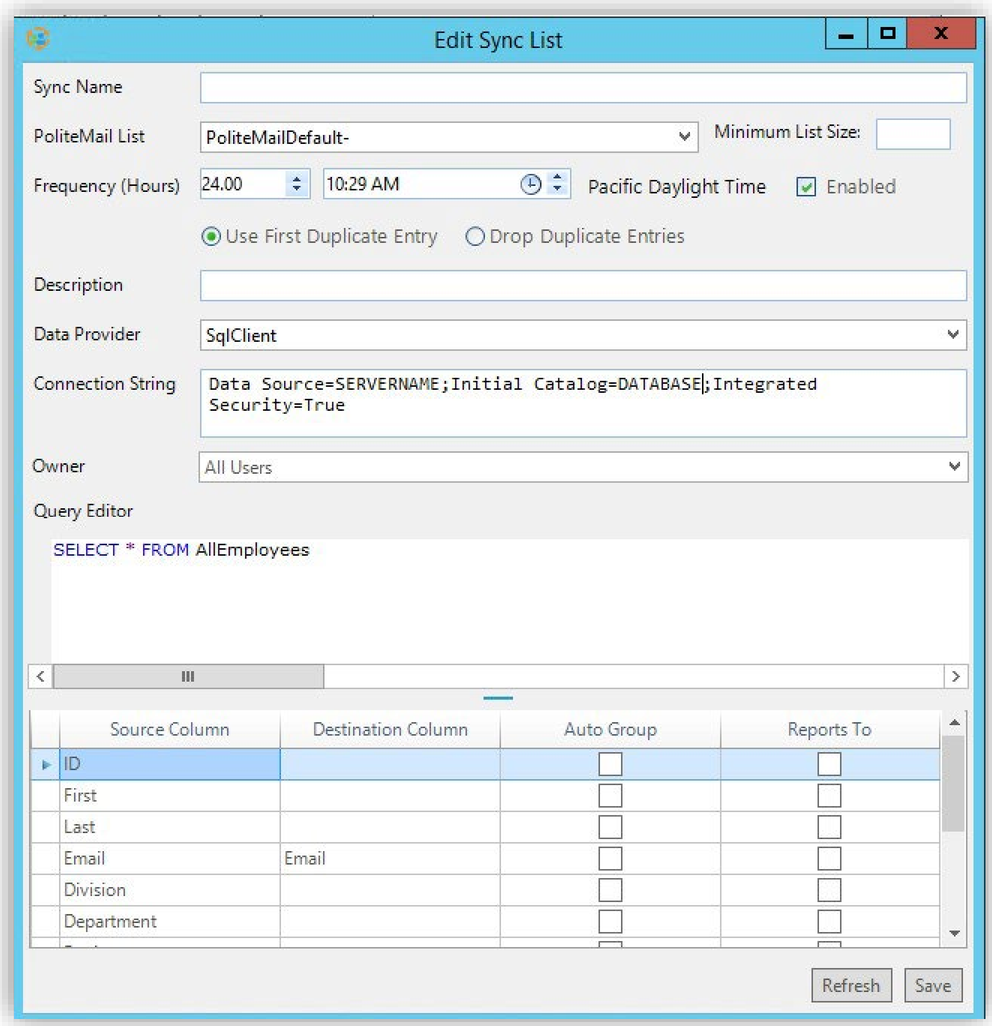
Syncronym Manager – Main Overview



File Menu	Choose what Syncs you want to add and the data source Mark the Syncs to be picked up by the service
View Menu	Refresh the view Clear EWS Cache
Tools Menu	Reset Syncronym user 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*

Sync Status	Completed – Sync has been completed Needs Sync – Not picked up by the service yet Pending – Has been picked up by the service and is in the queue Syncing – Has been picked up by the service and is in process

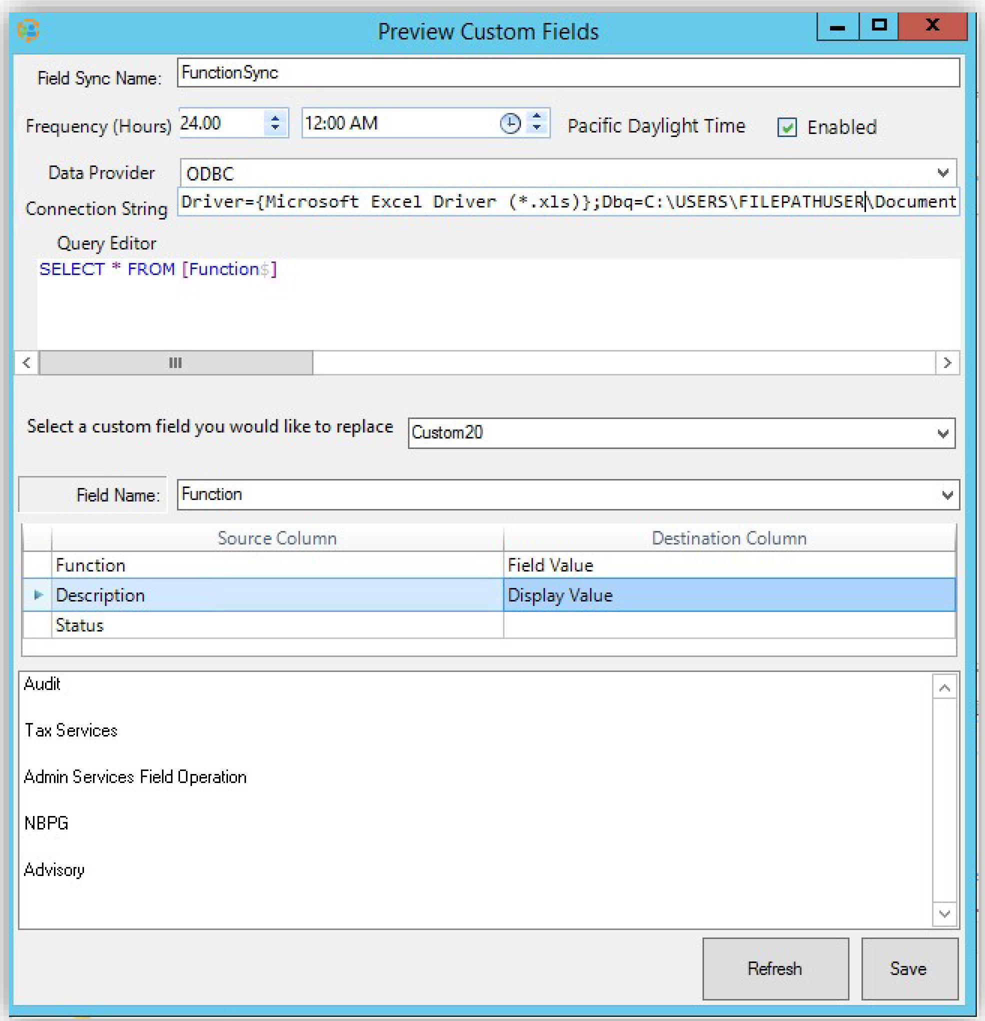
Contact Edit Sync List – Overview



Sync Name	The name of the Sync being created
PoliteMail List	The PoliteMail list that the Sync will add contacts to

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*

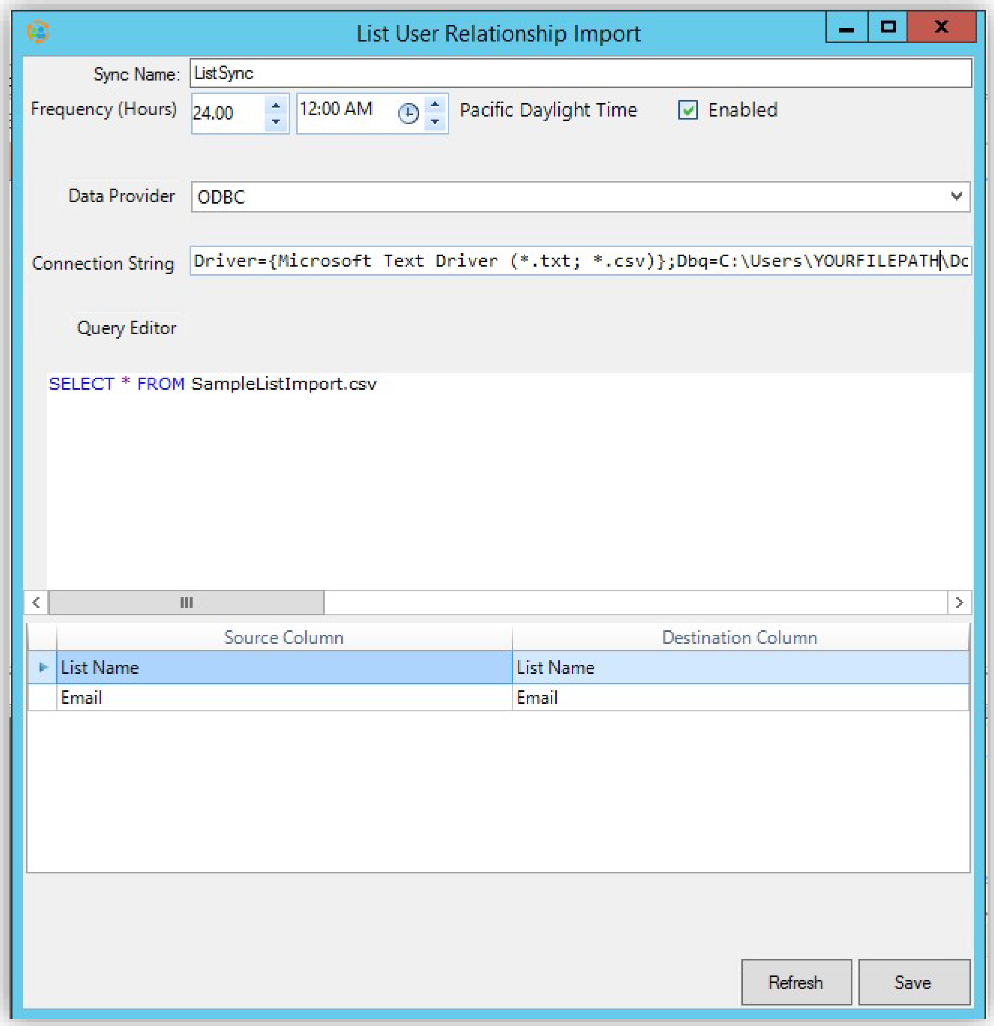
Custom Field Sync – Preview Custom Fields Overview



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

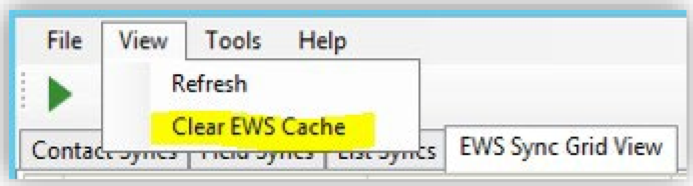
Contact List Sync – User Relationship Import Overview

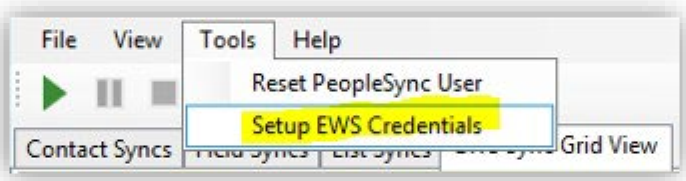


Field Sync Name	The name of the Sync being created
Frequency	Set the frequency for the Sync
Data Section	Auto fills data from previous setup menus that can be edited or modified
Custom Field	The custom field that the Sync will utilize

Mapping Chart	Displays mapping and destination attributes

EWSCache Sync Overview





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

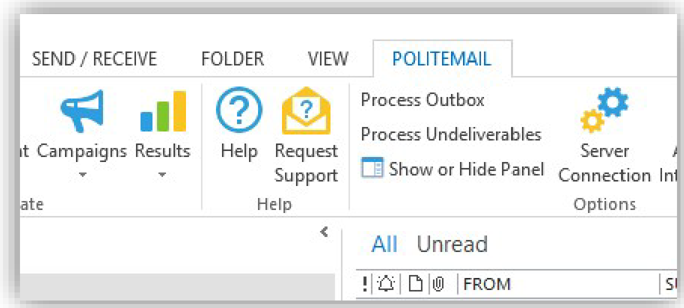
Syncronym will update List Memberships using EWS if a user has setup EWS. If the list has been used, sent to, the cache file will be set to Auto Update and every 24 hours the members will be updated using the EWS Credentials. If the list was just expanded using EWS (ex. Get Recipient Count) it will cache 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.

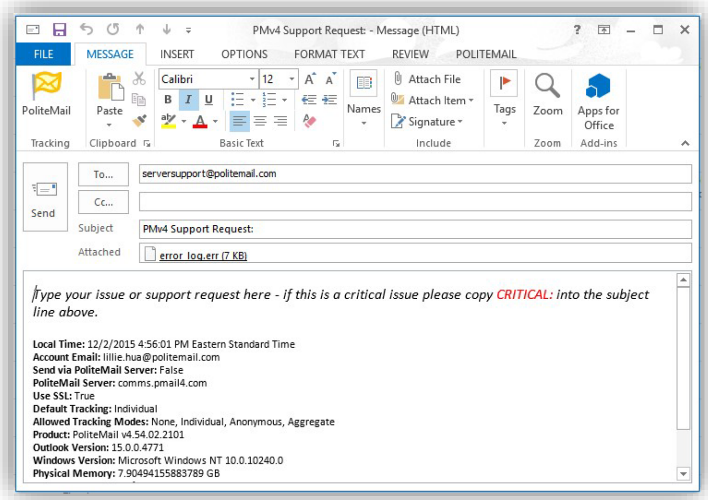
Support

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