

Kerio Connect

Kerio Connect Client

Kerio Technologies

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Kerio Connect Client

Kerio Connect Client

Kerio Connect Client is a web client designed to speed up your work.

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

To see all articles about the Kerio Connect Client, read the articles [in the Kerio Connect Client category](#).



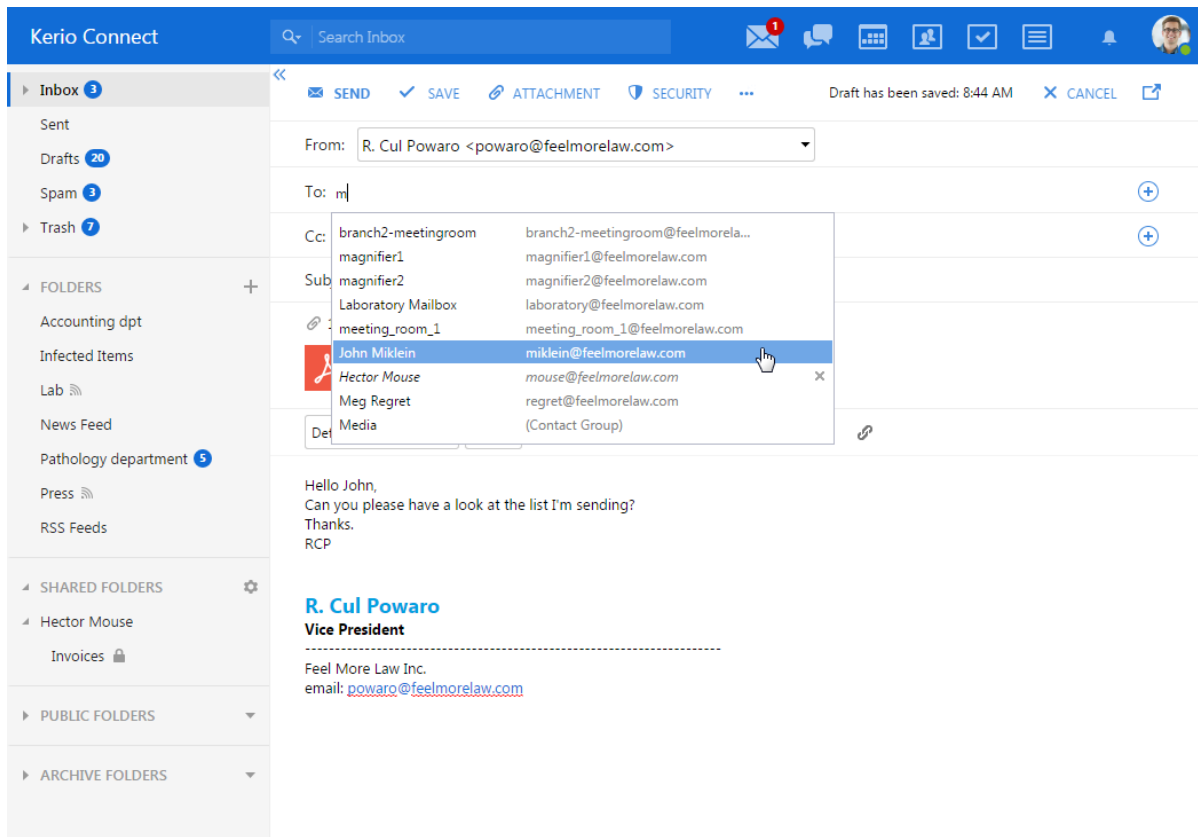
Watch the [Working with Kerio Connect Client](#) video.

Emails

In the **Email** section in the Kerio Connect Client you can, for example:

- [Send and receive messages](#)
- Use fulltext search — Just type in what you need and search through messages, email addresses, subjects, and so on.
- [Receive less spam](#) — Create your own whitelist and Kerio Connect Client then never marks messages from the whitelisted addresses as spam.
- Add attachments easily — Just drag & drop an attachment into the composer window.
- 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.
- [Digitally sign and encrypt messages](#).

Kerio Connect Client



Chat

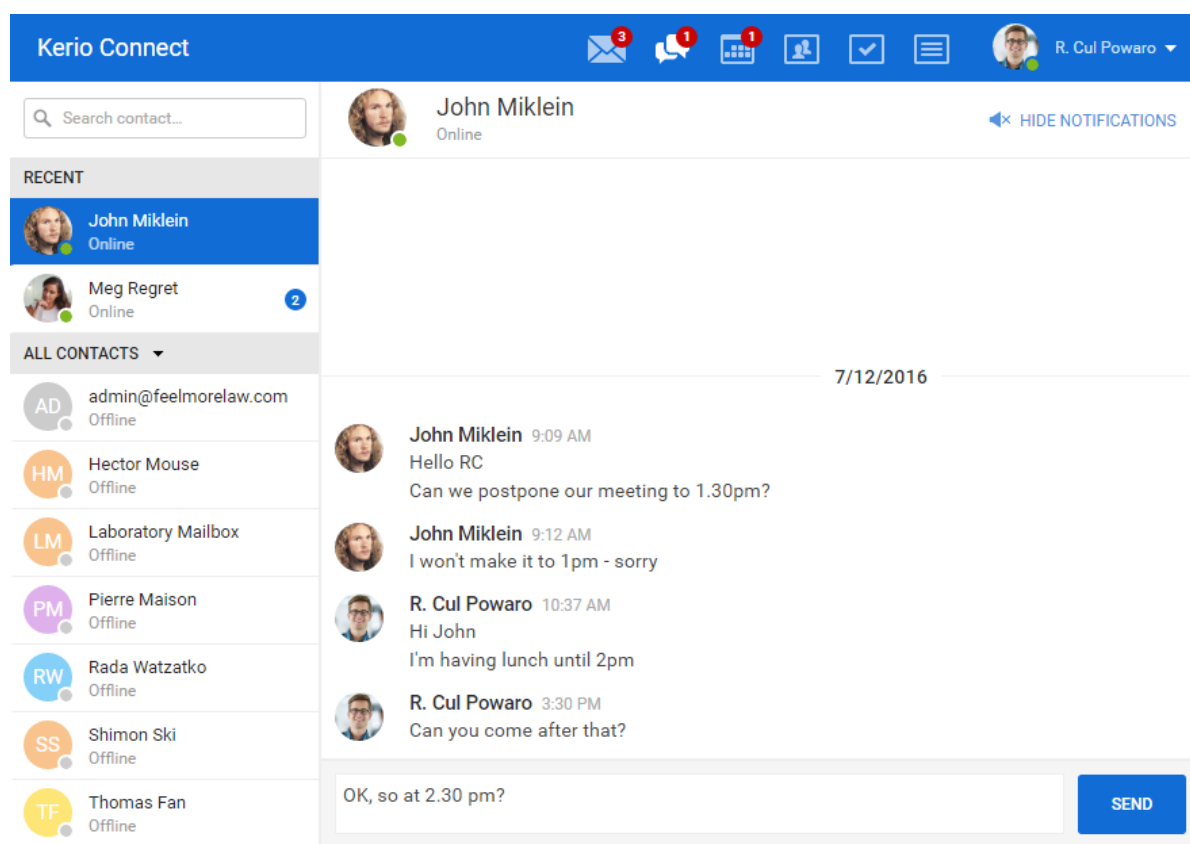


New in Kerio Connect 9.1!

In the **Chat** section in Kerio Connect Client, you can:

- [Send instant messages to your colleagues.](#)
- [Set your online status.](#)
- See immediately the online status of your colleagues.
- [Get notified about new instant messages you receive.](#)

For detailed info, read [Sending chat messages in Kerio Connect Client.](#)

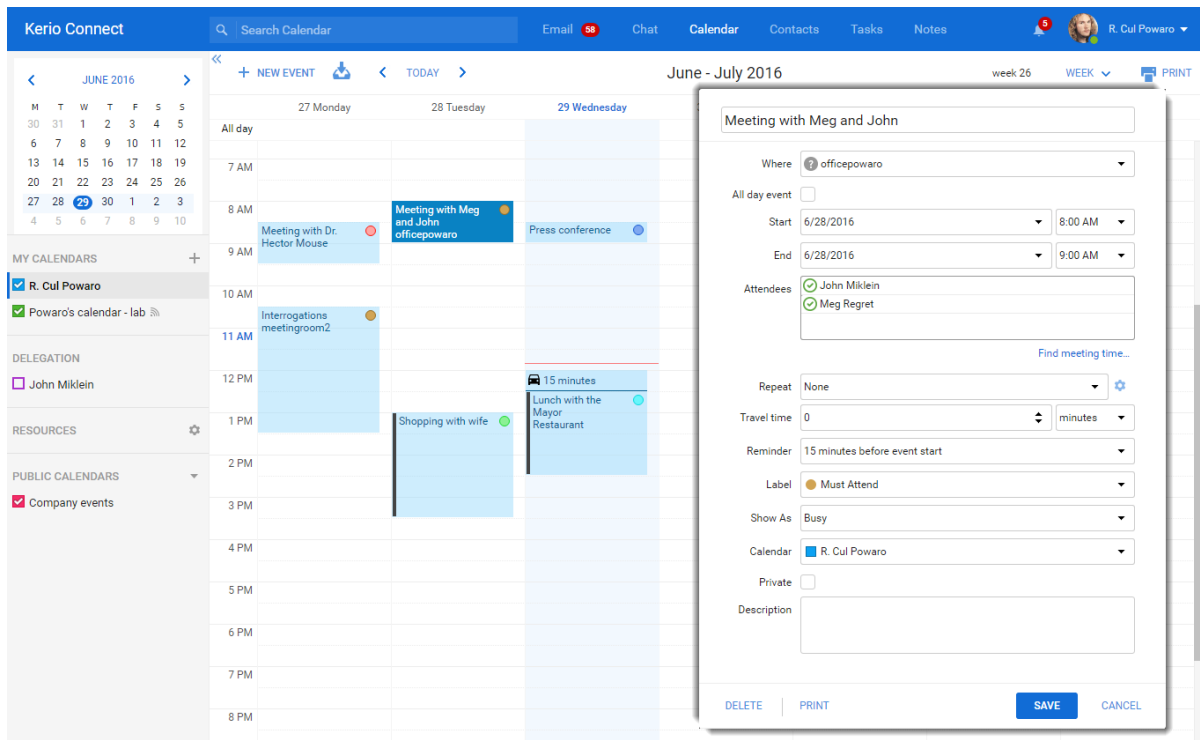


Calendars

In the **Calendar** section in Kerio Connect Client you can, for example:

- [Create events in seconds](#) — Just double-click inside your calendar and create an event.
- Invite other people to your meeting.
- See immediately who is available (Free/Busy calendar).
- Set reminders for your events.
- Add travel time so that you never come late.
- [Create repeated events](#).
- [Share calendars with other people](#).
- [See calendars that other people have shared with you](#).

Kerio Connect Client



Contacts

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

- [Create contacts easily](#) in the contacts section or directly from an email message.
- [Organize contacts into groups.](#)
- [Call people directly by clicking on their phone number.](#)
- [Share contacts with other people.](#)
- [See contacts that other people have shared with you.](#)



● online

R. Cul Powaro

Feel More Law

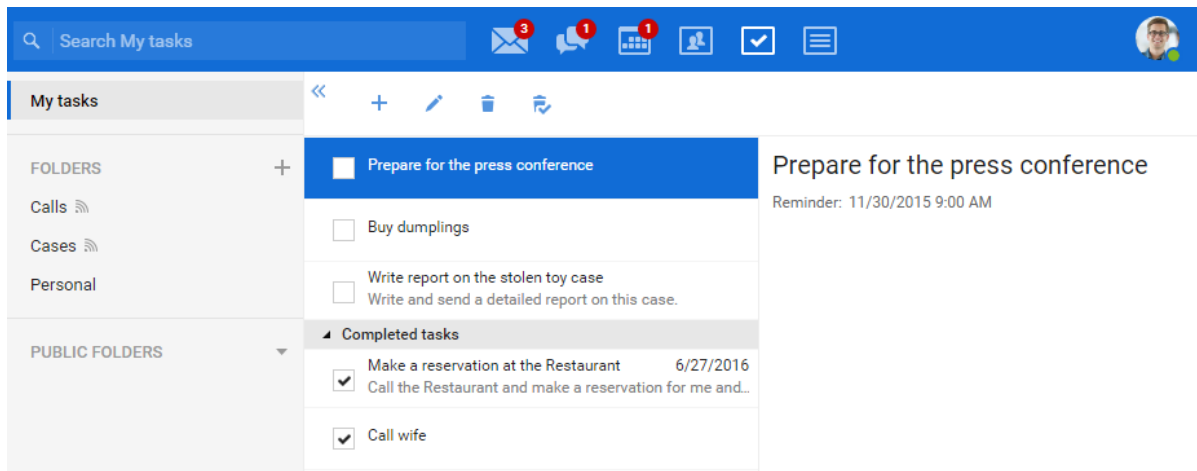
Job title	Vice President
Work email	 powaro@feelmorrelaw.com
Work email	rcp@feelmorrelaw.com
Work phone	+123456789
Work web	www.feelmorrelaw.com
Home web	www.powaro.info
Work address	Anglicke nabrezi Plzen 30100 Czech Republic
Assistant	Thomas Fan

Tasks

In the **Tasks** section in Kerio Connect Client you can:

- [Create tasks and sort them into groups.](#)
- [Share task groups with other people.](#)
- [See tasks that other people have shared with you.](#)

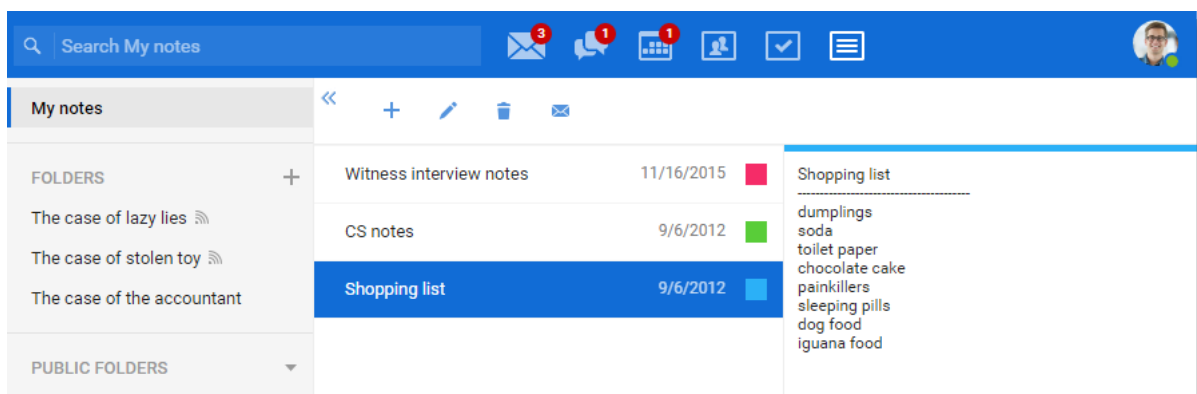
Kerio Connect Client



Notes

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

- Write color-coded (multi-colored) notes.
- Share notes with others.
- See notes that other people have shared with you.
- Send notes as email messages with one click.



Configuring your Kerio Connect Client

What to configure in your Kerio Connect Client

In Kerio Connect Client, you can configure these settings:

- [Email signature](#)
- [Hide images from external sites](#)
- [Set the displayed emails as read after a specified time interval](#)
- [Interface language and time zone](#)
- [Specify the Reply-to and From email address](#)
- [Password \(if allowed\)](#)
- [Store quota \(view only\)](#)

Configuring several additional settings is covered in other articles:

- [Colors \(theme\)](#)
- [Message preview](#)
- [Out of Office message](#)
- [Delegation](#)
- [Whitelist email address](#)
- [Email filters](#)
- [Notifications for new messages and event/task reminders](#)
- [Folders to be synced to mobile devices](#)
- [Send signed and encrypted messages](#)
- [Manage and reset your mobile devices](#)
- [Hide/display folder tree](#)
- [Configure Click to Call \(if available\)](#)

Configuring your Kerio Connect Client

Configuring email signature

In Kerio Connect Client, you can create a signature block that is automatically appended to every message you write.

1. Click your name in Kerio Connect Client and select **Settings**.

2. Go to **Email** → **Signature**.

3. Type whatever text you want at the end of your messages.

You can also use HTML code instead of plain text.

The maximum length of the signature is 4095 ASCII characters.

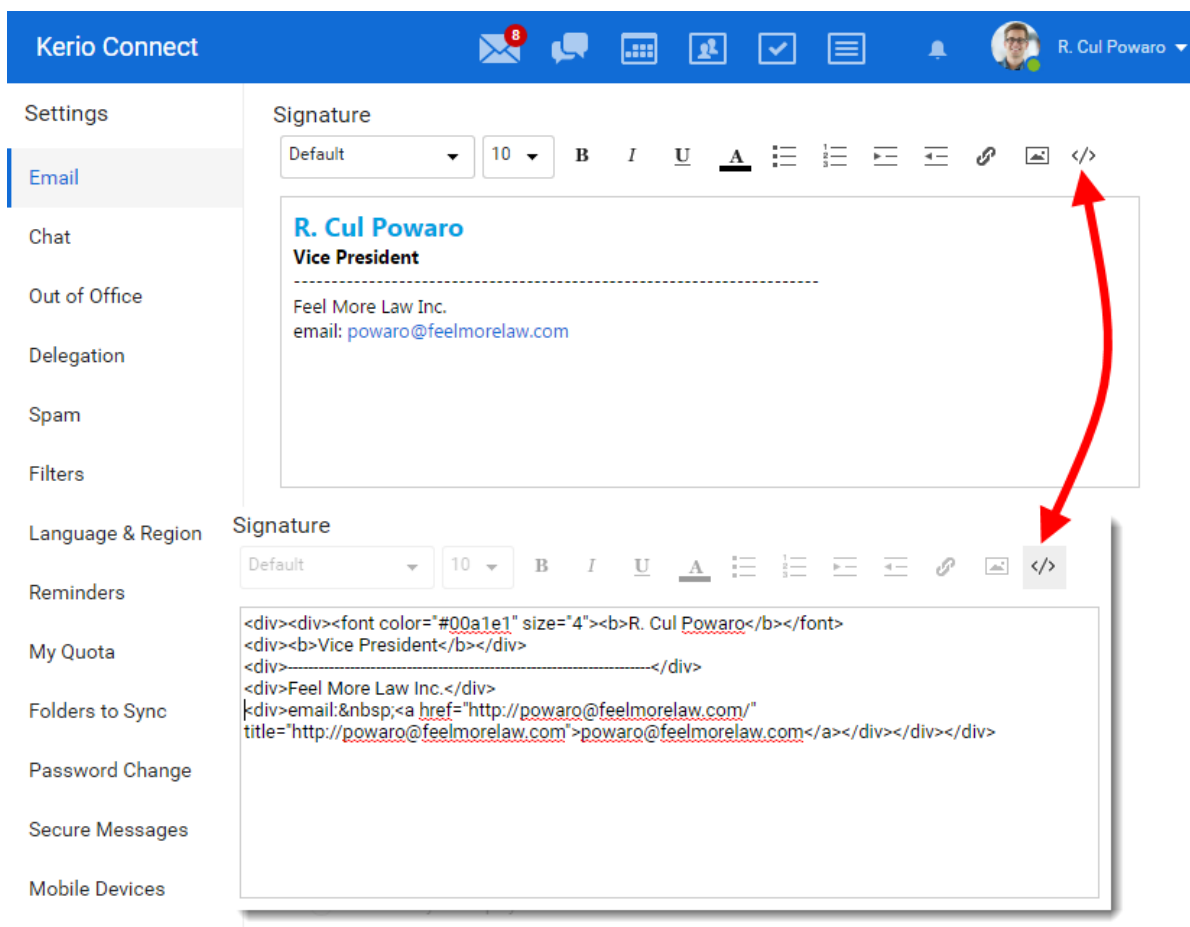


New in Kerio Connect 9.1!

You can insert images directly in your signature.

Kerio Connect Client displays the images in their original size.

4. Click **Save** at the bottom.



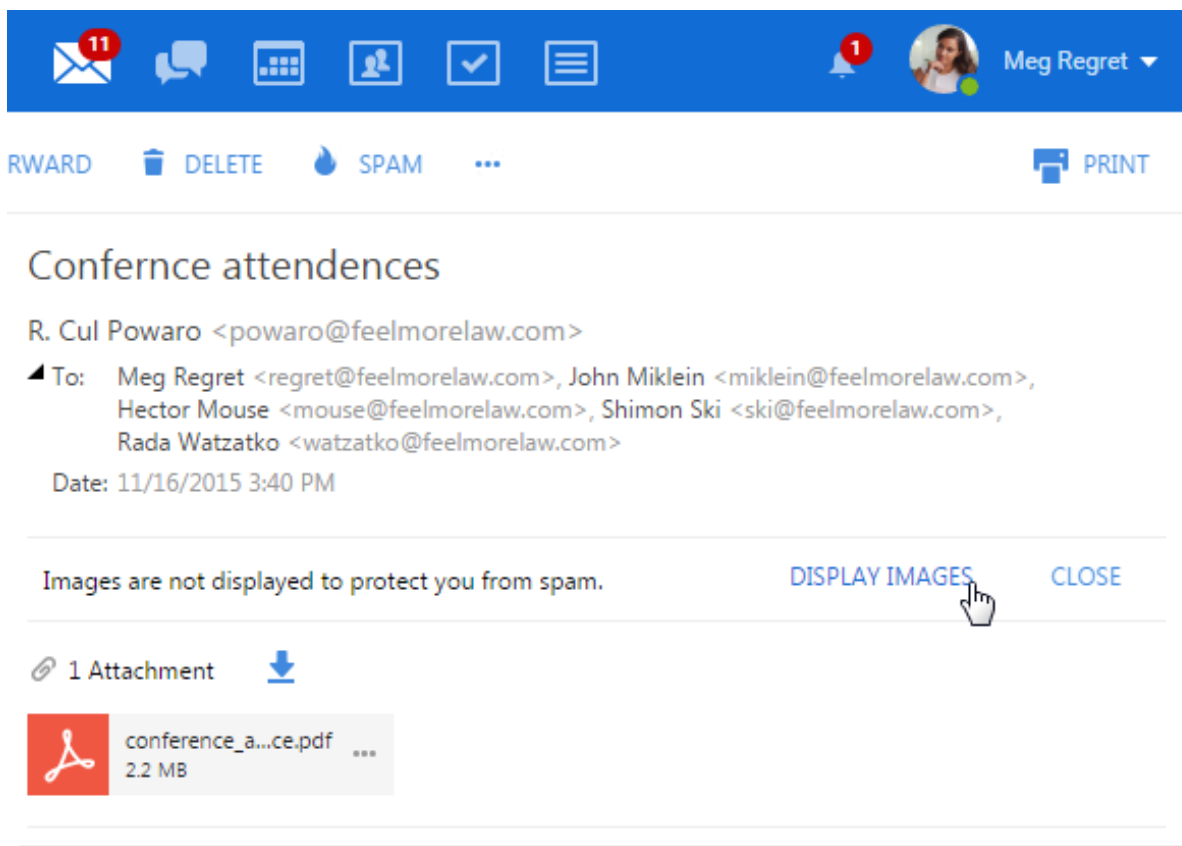


If you reply to a message, Kerio Connect Client places your signature directly under your reply.

Hiding images from external sites

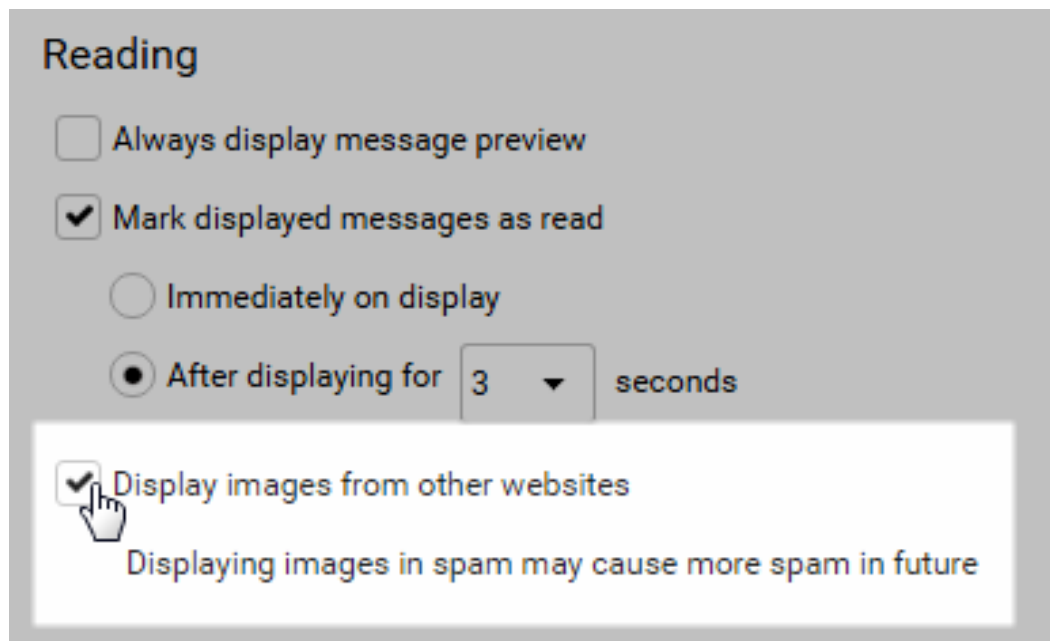
Kerio Connect Client hides all images from external sites in your emails.

To display them manually, click **Display images** under your message header.



To display messages automatically:

1. Click your name in Kerio Connect Client and select **Settings**.
2. Go to **Email** → **Reading**.
3. Select **Display images from other websites**.



4. Click **Save**.

Setting messages as read

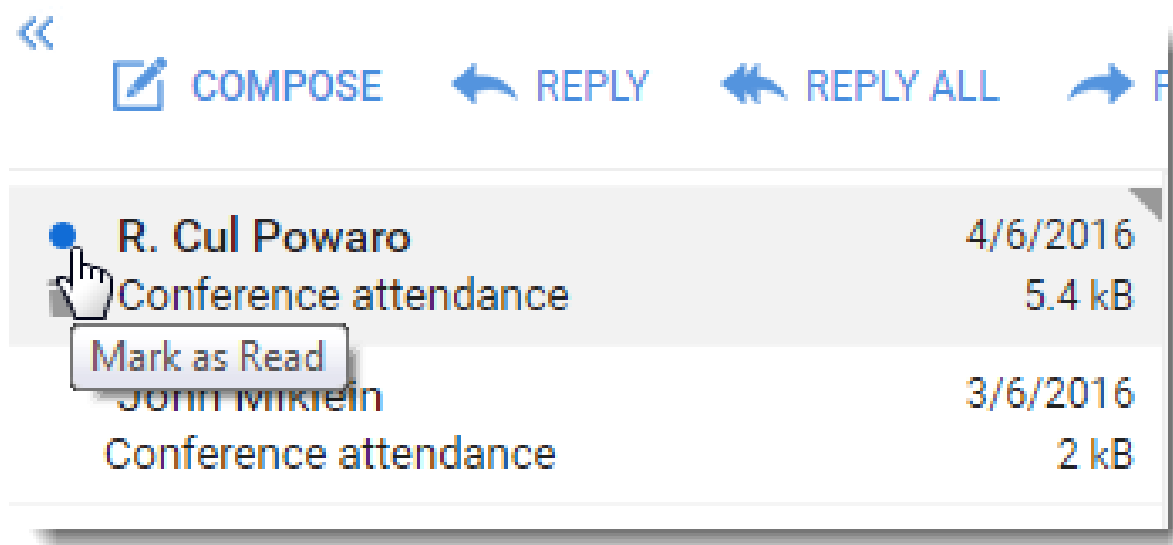
You can specify the time interval after which each message will be marked as read.

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



4. Click **Save**.

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



Setting language

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

All items, such as messages, contacts, events and tasks, in all folder types are sorted by the alphabet of the selected language.

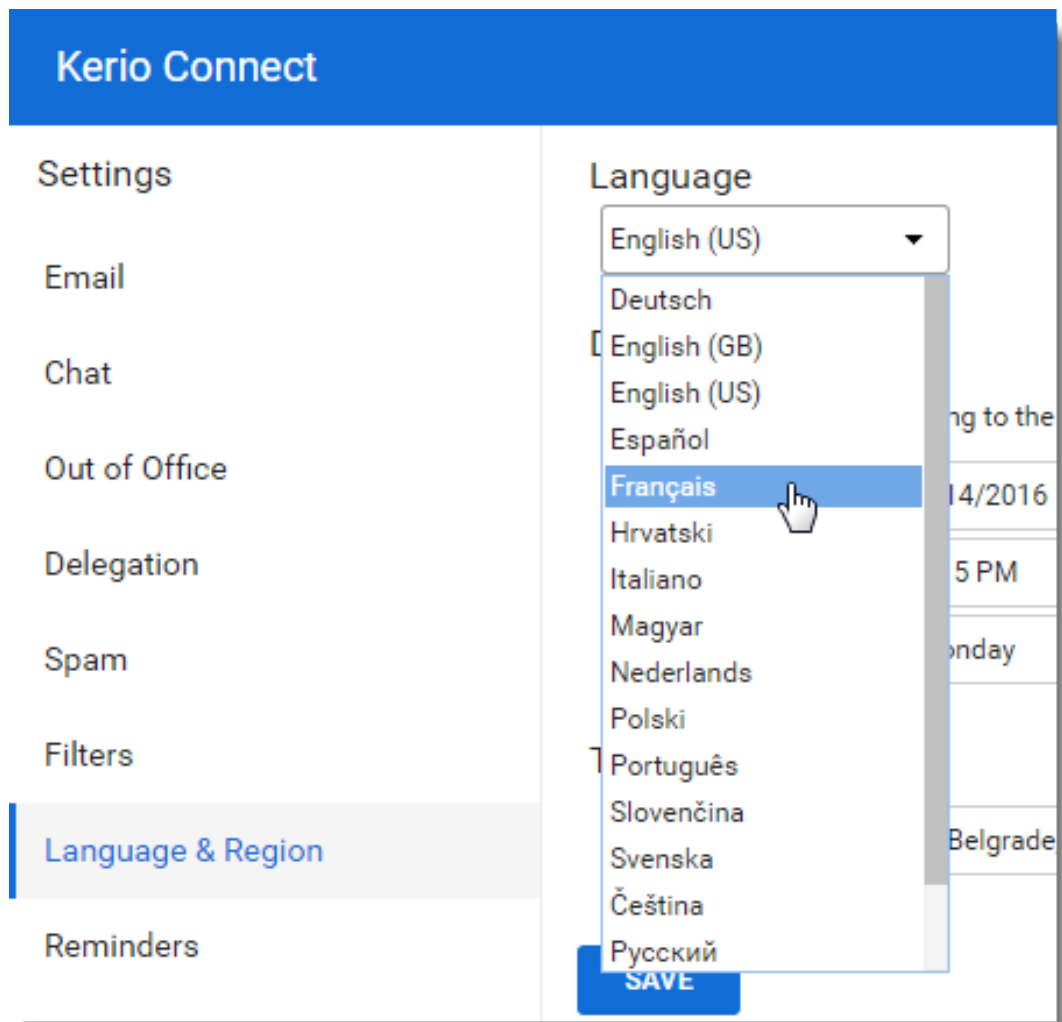
Configuring your Kerio Connect Client



You can also add your own languages. See the [Translating Kerio Connect Client to a new language](#) article.

To select a language:

1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Language & Region** section, select your preferred language.
3. Save your settings.



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

Setting language in Kerio Connect Client 8.4 and older

To select a language for your interface:

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

Configuring time display

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

By default, time zone settings are based on Kerio Connect server. If you are in a different time zone, you can change the time settings.

Selecting time zones

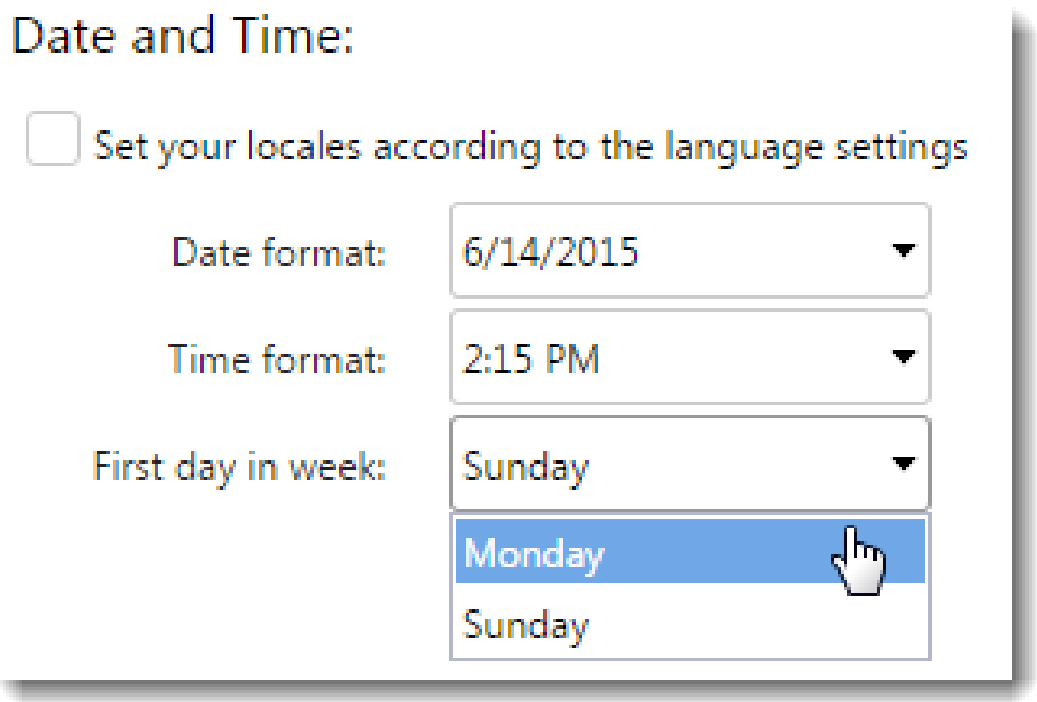
1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Language & Region** section, select your preferred time zone.
3. Save your settings.

Changing the time format

Time is displayed according to your [selected language](#). You may want to use different settings, for example, you want to display the Kerio Connect Client in French and use English (US) for the date format.

1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Language & Region** section, unselect the **Set your locales according to the language settings**.
3. Select the date and time formats and the first day of the week.
4. Save your settings.

Date and Time:



☐ Set your locales according to the language settings

Date format: 6/14/2015 ▼

Time format: 2:15 PM ▼

First day in week: Sunday ▼

Monday

Sunday

Configuring time display in Kerio Connect Client 8.4 and older

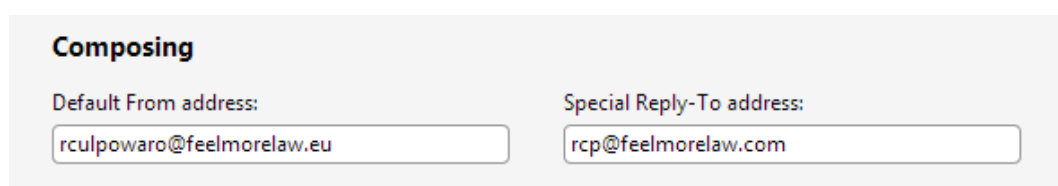
To select a time zone and change the time format:

1. Click your name in Kerio Connect Client and select **Settings**.
2. Go to **Language and time**.
3. Select your preferred time zone.
4. Unselect **Set your locales...** and select a new locales format.
5. Save your settings.

Setting email addresses

In Kerio Connect Client, you can set the address that is displayed on your outgoing messages and the address that replies will come to.

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



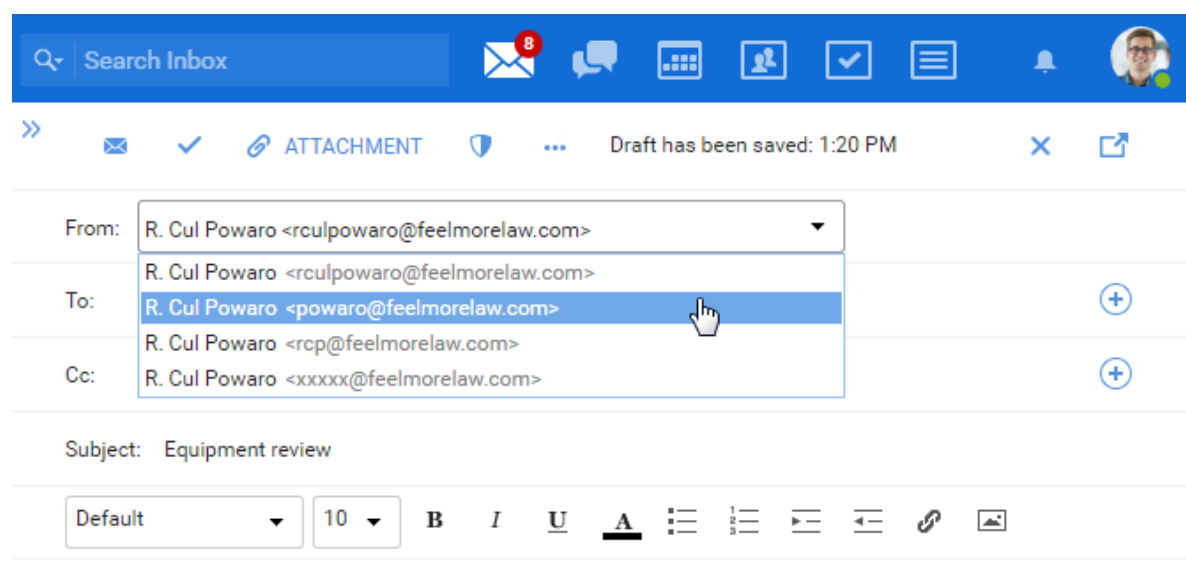
Composing

Default From address:

Special Reply-To address:

4. Click **Save**.

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



Search Inbox

8

»

ATTACHMENT

Draft has been saved: 1:20 PM

From: R. Cul Powaro <rculpowaro@feelmorlaw.com>

To: R. Cul Powaro <rculpowaro@feelmorlaw.com>

R. Cul Powaro <powaro@feelmorlaw.com>

R. Cul Powaro <rcp@feelmorlaw.com>

Cc: R. Cul Powaro <xxxxx@feelmorlaw.com>

Subject: Equipment review

Default 10 B I U A

Changing your password

To change your account password:

1. Log in to Kerio Connect Client securely via HTTPS.
2. Click your name in Kerio Connect Client and select **Settings**.
3. In the **Password Change** section , type your current and new passwords.

If your administrator requires complex passwords, Kerio Connect Client tells you what you must include in your new password.

Password Change

Current password

.....

New password

.....

Confirm password

.....

CHANGE PASSWORD

- ✓ at least 6 characters
- at least 3 groups of characters
- ✓ not contain your name or email

4. Save your settings.



If the **Password Change** option is not available, 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.

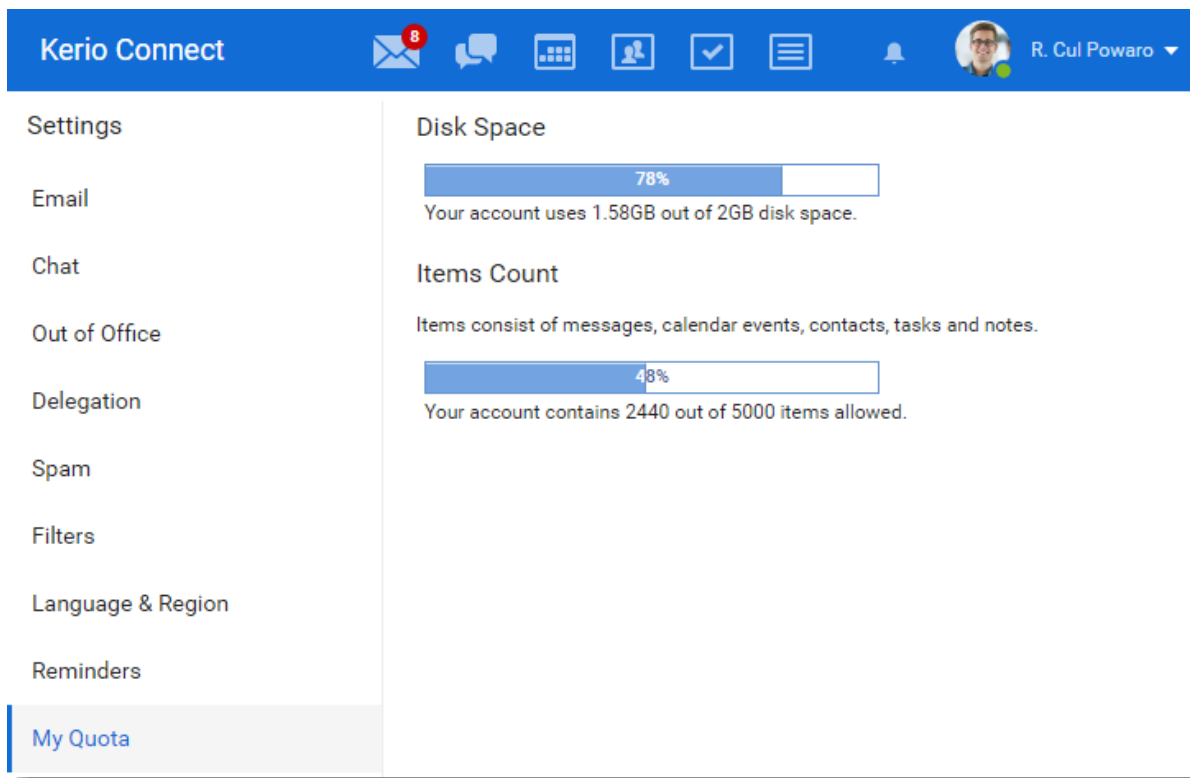
The limitations include:

- Space available for your messages
- Number of items allowed

To see how much space you can use:

1. Click your name in Kerio Connect Client and select **Settings**.
2. Go to the **My Quota** section.

There you can see how much space your account is currently using, how many items you have, and what your limitations are.



What to do when your quota is filled 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 is displayed in the top bar of Kerio Connect Client.



To solve this problem, we recommend the following:

- Delete any unneeded messages in the **Sent** and **Trash** folders.
- Delete any other messages you do not need, especially ones with large attachments.
- Ask your administrator to turn on automatic items clean-out. This will automatically delete old messages and messages from the trash)
- ask your administrator to add some space for your account

Spam settings in Kerio Connect Client

Overview



New in Kerio Connect 8.4!

Kerio Connect contains a sophisticated antispam filter.

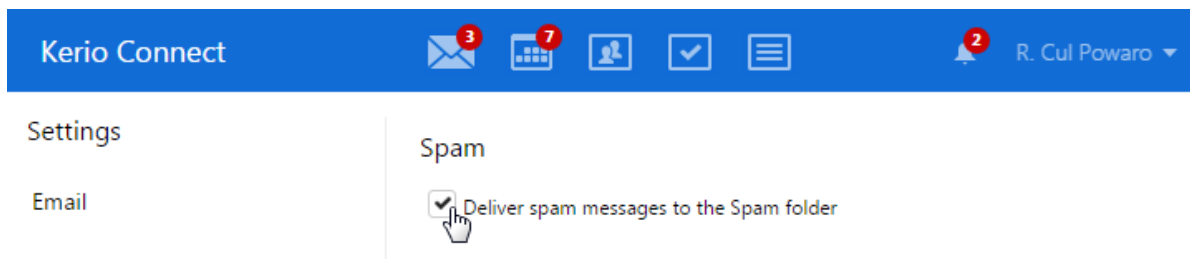
You can:

- Let Kerio Connect move spam messages to your **Spam folder** automatically
- Create a "whitelist" of senders so you are sure you receive their messages

Moving messages to the Spam folder automatically

To automatically send all messages marked as spam to the **Spam** folder:

1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Spam** section, select **Deliver spam messages to the Spam folder**.
3. Click the **Save** button.



Creating a spam whitelist

In Kerio Connect Client, you can create a special whitelist of email addresses. Messages sent from these addresses will never be considered spam.

To add email addresses to your whitelist:

1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Spam** section, under **Spam whitelist**, click the plus sign.

3. Type the email addresses you want to add to the whitelist.
4. (Optional) Select **Trust senders from my Contact folder**.
5. (Optional) Select **Add the email address of the original sender while sending a reply**.
6. Click the **Save** button.

Spam

☒ Deliver spam messages to the Spam folder

Spam whitelist

☒ Trust senders from my Contact folder

☒ Add the email address of the original sender while sending a reply

Do not treat messages as spam, if the sender is on the following list:

ablack@othercompany.com	
jwayne@company.com	
powaro@company.com	

[+ ADD WHITELIST RULE](#)

SAVE

Adding addresses from email messages

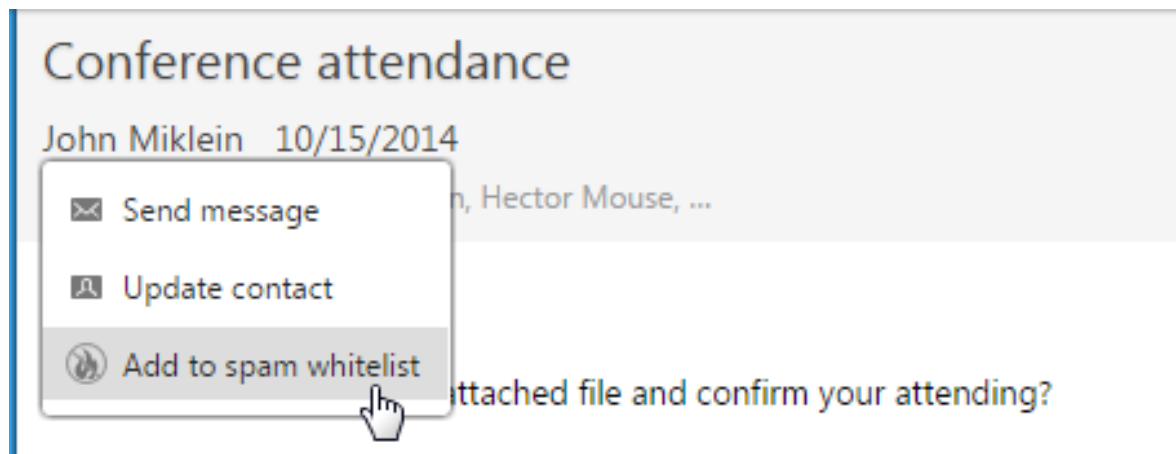


New in Kerio Connect 8.5!

You can add messages to your whitelist directly from any messages you receive.

1. Select a message in Kerio Connect Client.
2. Click any name or email address in the message header.
3. Click **Add to spam whitelist**.

Spam settings in Kerio Connect Client



Kerio Connect adds the email address to your spam whitelist in your Kerio Connect Client settings (see above).

Customizing the appearance of Kerio Connect Client

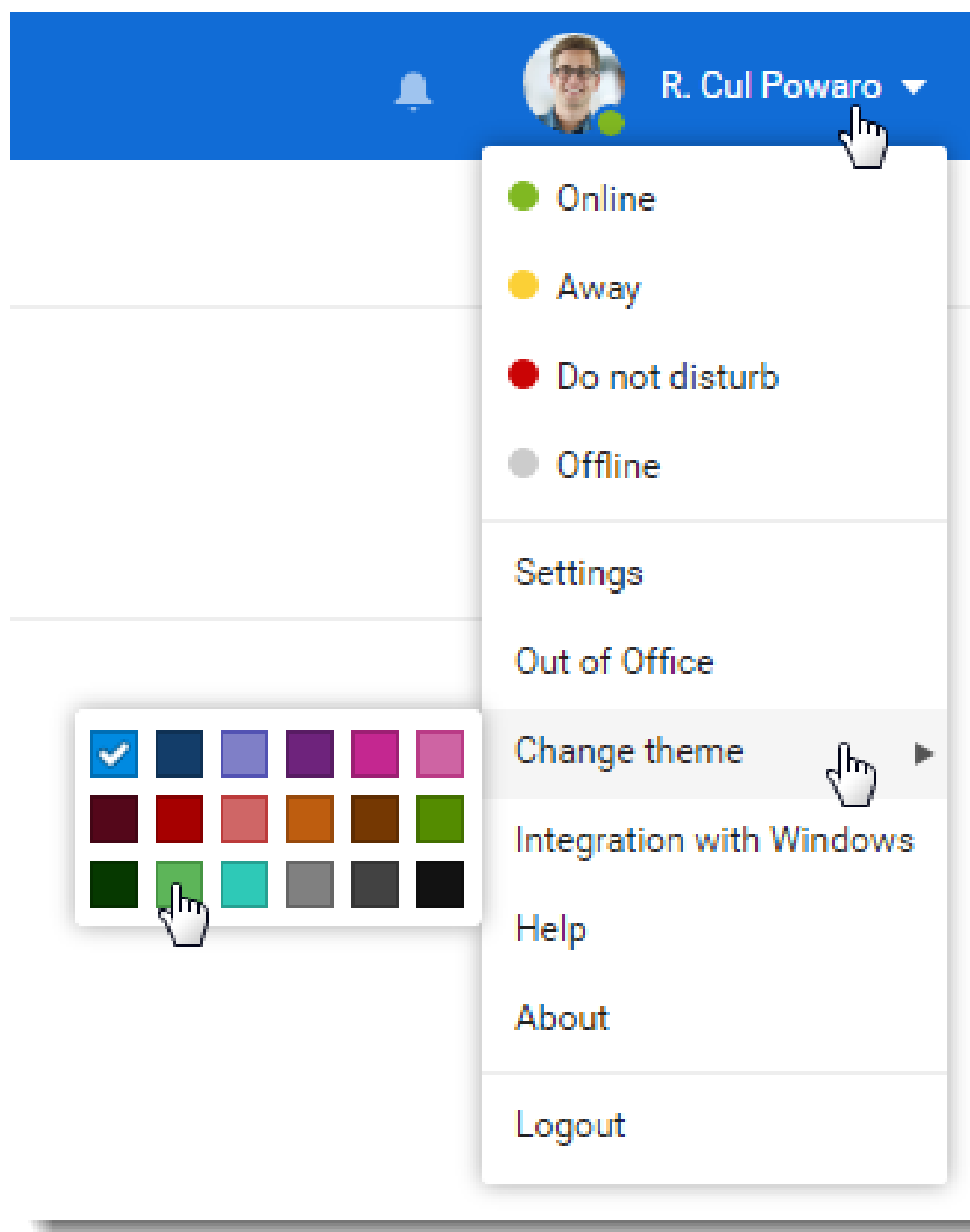
Overview

To customize the appearance of your Kerio Connect Client, you can:

- [Change the color theme](#)
- [Select the position of the message preview pane](#)
- [Hide the folders menu](#)

Changing the color theme

The 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**.

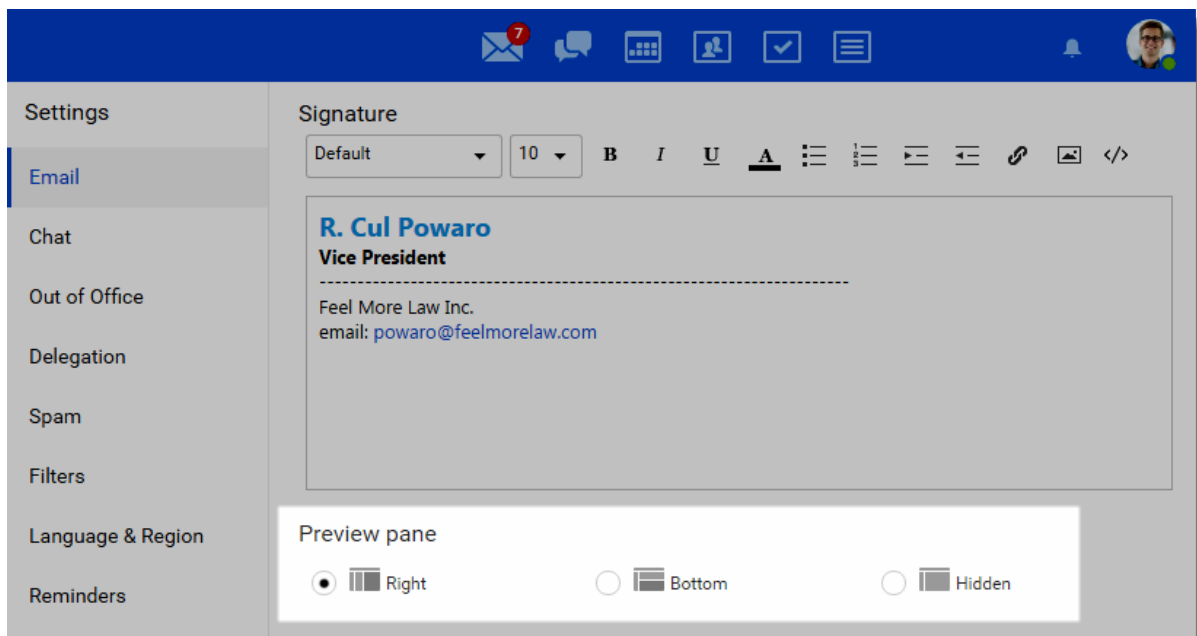


Previewing messages

In Kerio Connect Client, you can preview your email messages on the right, on the bottom, or you can hide the preview window.

To select where to display previews of messages:

1. Click your name in Kerio Connect Client and select **Settings**.
2. Go to the **Email** section.
3. In the **Preview pane** section, select the position of the pane or disable it.
4. Click **Save**.



Hiding the folders menu

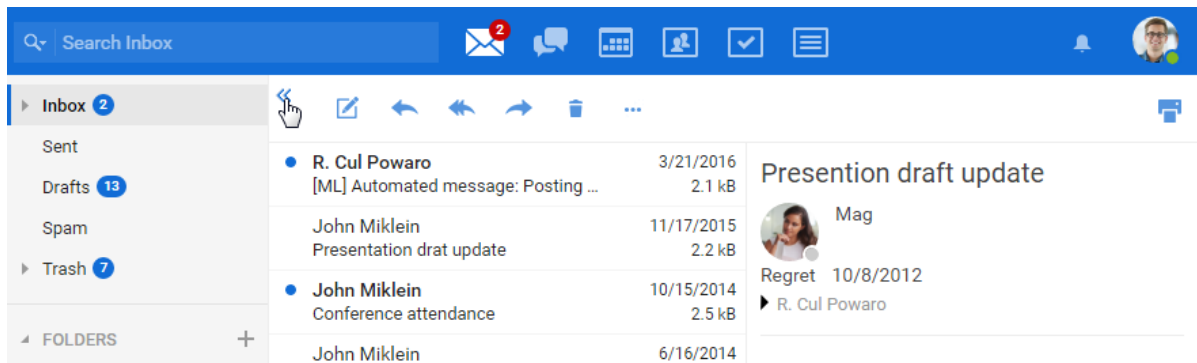
To save some space on your screen, you can hide the folder tree on the left.



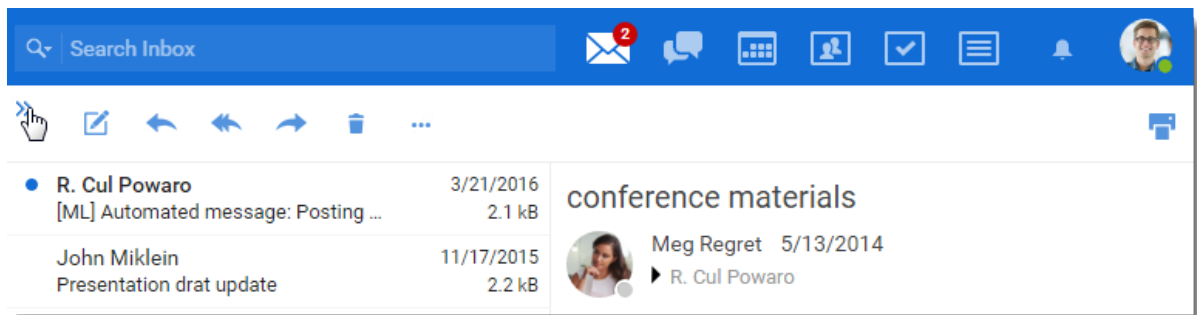
Click the blue double-arrow button under the **Search** box.

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

Customizing the appearance of Kerio Connect Client



To display the folder tree, click the blue double-arrow again.



Configuring the Out of Office message

Configuring the Out of Office message

Out of Office message is an automatic reply that Kerio Connect can send when you are away.

If you plan to go on holiday, you can let your business partners and customers 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**, select the **Send "Out of Office" messages** option.
3. Write your message.
4. You can specify a time period when Kerio Connect sends this automatic reply.
5. Save your settings.

The screenshot shows the 'Kerio Connect' application window. The top blue header bar contains the application name and several icons: an envelope with a red '1', a calendar with a red '7', a person icon, a checkmark icon, and a list icon. On the right side of the header is a notification bell icon with a red '2' and a dropdown arrow. The left sidebar lists settings categories: Settings, Email, Out of Office (highlighted with a blue bar), Delegation, Spam, Filters, Language & Region, Reminders, My Quota, and Folders to Sync. The main content area is titled 'Out of Office' and contains the following text: 'Setting of automated responses to incoming messages. These messages can inform senders that you currently don't have access to your mailbox.' Below this is a checkbox labeled 'Send "Out of Office" messages' which is checked. Underneath is another checkbox labeled 'Only in this period:' which is also checked. This is followed by a date and time range selector showing '11/22/2015' to '11/24/2015' with '9:00 AM' and '5:00 PM' respectively. A large text area contains the message: 'I will be out of the office until November 24, 2015. In urgent cases please contact Shimon Ski (ski@feelmorlaw.com) +420 123 456 789 Best regards, R. Cul Powaro'. Below the text area is the note 'Will be sent only once to each sender.' and a blue 'SAVE' button.

Kerio Connect

Settings

Email

Out of Office

Delegation

Spam

Filters

Language & Region

Reminders

My Quota

Folders to Sync

Out of Office

Setting of automated responses to incoming messages. These messages can inform senders that you currently don't have access to your mailbox.

☒ Send "Out of Office" messages

☒ Only in this period:

11/22/2015 9:00 AM — 11/24/2015 5:00 PM

I will be out of the office until November 24, 2015.

In urgent cases please contact Shimon Ski (ski@feelmorlaw.com)
+420 123 456 789

Best regards,
R. Cul Powaro

Will be sent only once to each sender.

SAVE

Configuring the Out of Office message

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

Sending messages in Kerio Connect Client

Sending email messages

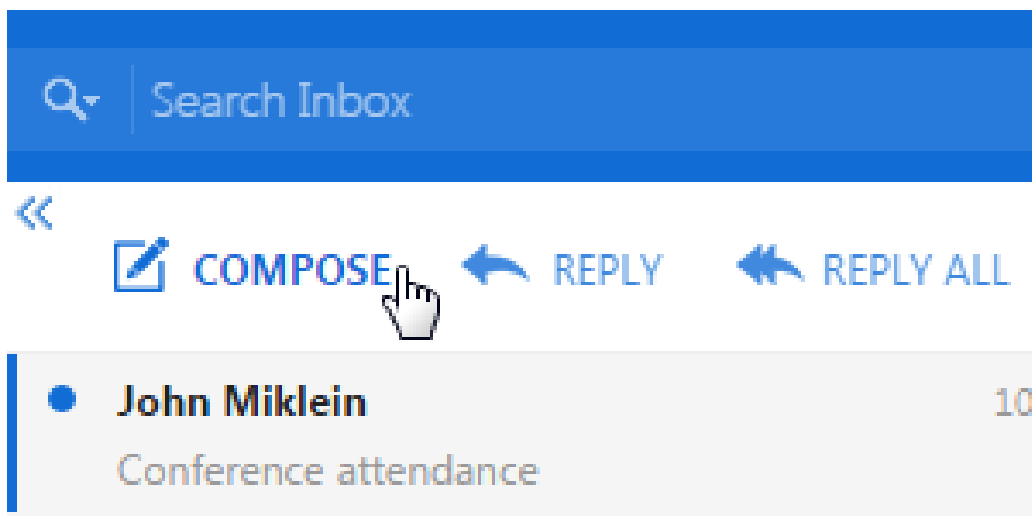
To send a message, you can:

- [Compose a new message](#)
- [Reply to a received message](#)
- [Forward a message](#)

Composing new messages

To compose a new email message:

1. In Kerio Connect Client, click **Compose** above the list of incoming messages.



This opens an editing window in your Kerio Connect Client.

- 2.

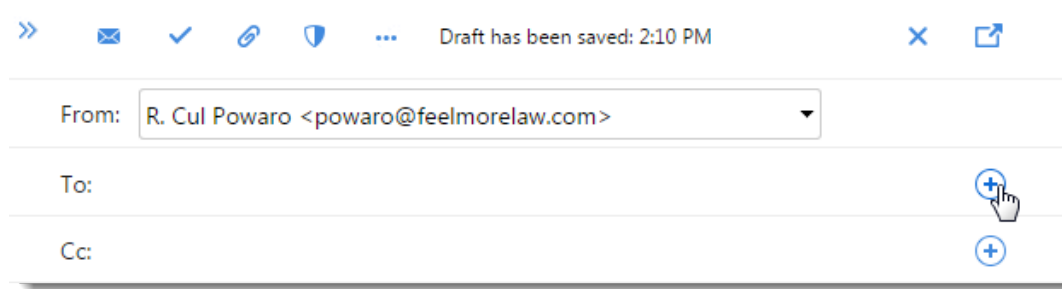
If you have multiple addresses defined (see [Defining addresses](#) below) or are a delegate (see the [Using delegation in Kerio Connect Client](#) article), you can select from which address you want to send the message.

3. In the **To:** and **Cc:** text boxes, type the email addresses of recipients.

As you type, Kerio Connect Client offers you matching addresses from your contacts.

Click the plus icon icon to select email addresses from your contacts folder.

Sending messages in Kerio Connect Client



To protect the privacy of some recipients, you can hide their email addresses from other recipients by using the **Bcc** field: click **Options** → **Bcc** and type the email addresses in the **Bcc** text box.

4. Type the **Subject** of your message.
5. Write your message in the main text area.
- 6.

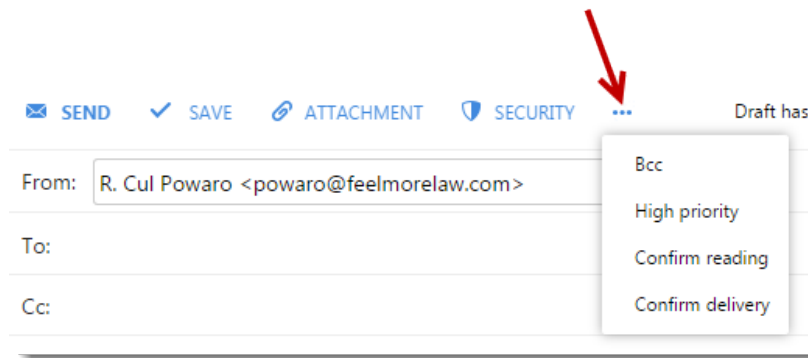


New in Kerio Connect 9.1!

You can insert images directly in the text. Kerio Connect Client displays the images in their original size.

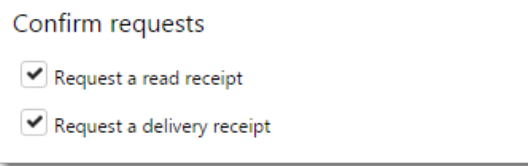


7. Use the following options as needed:
 - To attach files to your message, drag files from your computer to the compose window or click **Attachment** and select your files.
 - [Digitally sign your message](#) by clicking **Security** → **Sign**.
 - [Encrypt your message](#) by clicking the **Security** → **Encrypt**.
 - Click the three dots to see addition options:



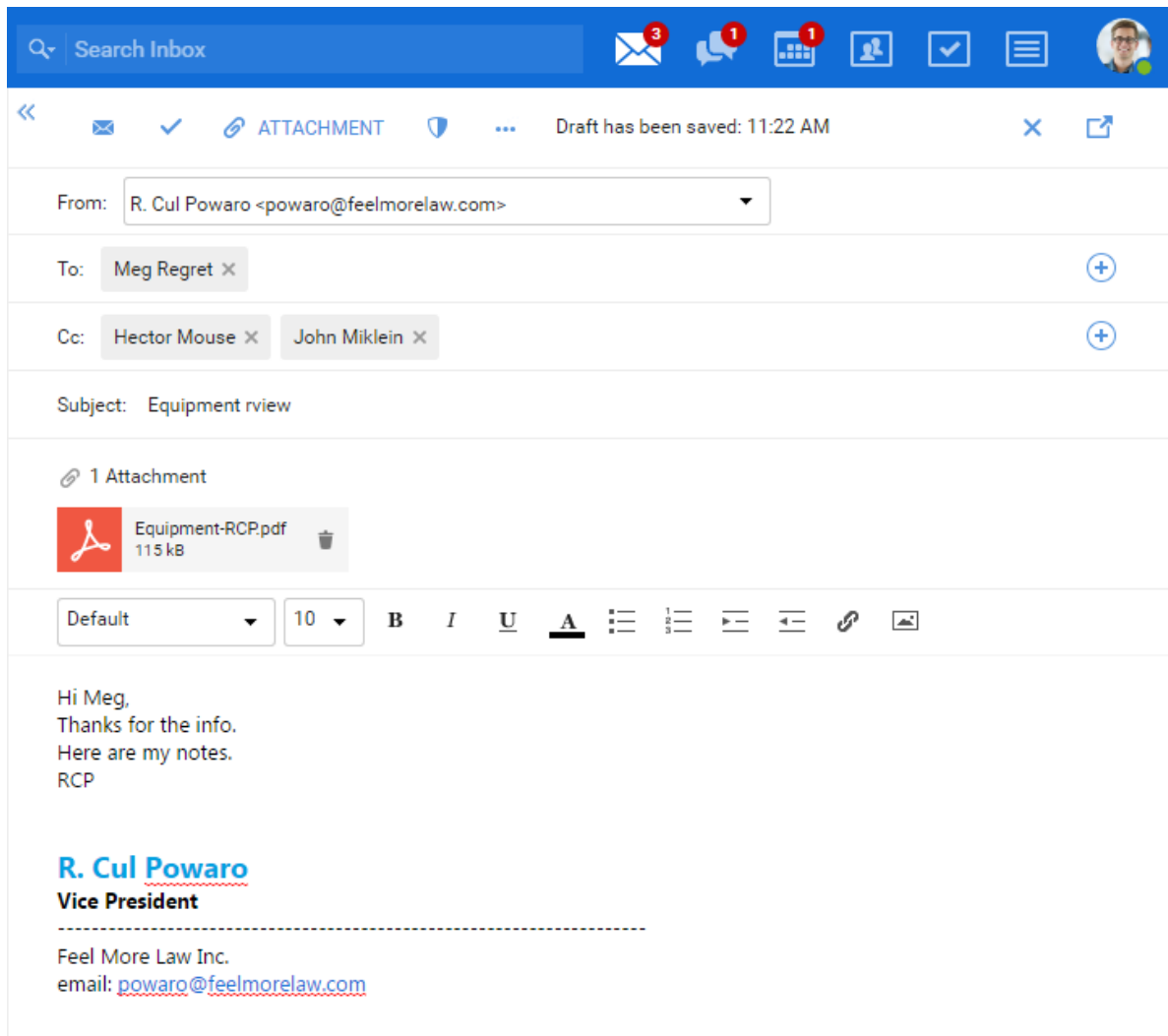
- Give the message a high priority,
- Request a read receipt (the **Confirm reading** option) and a delivery confirmation receipt (the **Confirm delivery** option).

In the Email section of your Kerio Connect Client settings, you can select both option to be used automatically.



8. Click **Send**.

Sending messages in Kerio Connect Client



Kerio Connect Client regularly saves drafts of your messages. If you want to send your message later, click **Save**. The message is saved to your **Drafts** folder.

If you [specify an email signature](#) in your settings, Kerio Connect Client automatically adds that signature to each message you compose.

After you click **Send**, Kerio Connects sends the message to all the recipients and saves a copy to your **Sent** folder.



Kerio Connect Client does not currently support spell checking.

Defining your addresses

When sending messages, you can set both **From** and **Reply-To** addresses that are different from your default address.

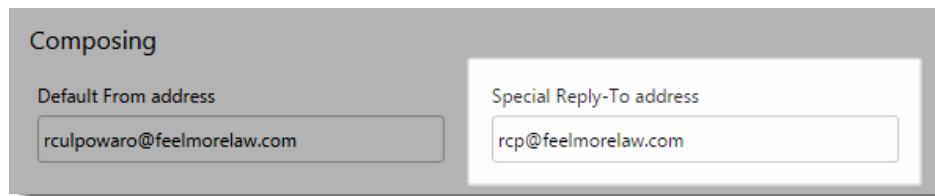
Reply-To address

To set a **Special Reply-To address**:

1. Click your name in the top right corner and select **Settings**.
2. Go to **Email**.
3. In the **Composing** section, type an email address in the **Special Reply-To address** field.

Replies to messages will now go to this **Reply-To** address, not the **From** address.

4. Click **Save**.

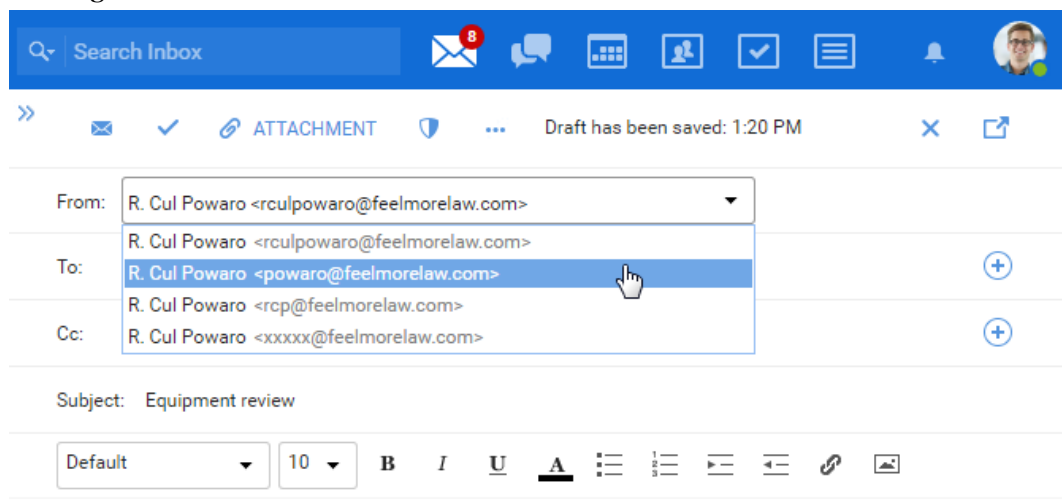


This applies to all the messages that you send from now on.

You can change or remove the addresses anytime.

From address

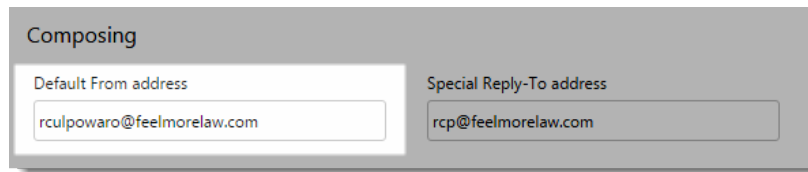
When composing a message, you can select which address Kerio Connect sends the message from.



From addresses can be defined in two ways:

- In Kerio Connect Client, you can add a **Default From address** (**Settings** → **Email** → **Composing**), or [send messages on behalf of another user](#) if that person has made you their delegate.

Sending messages in Kerio Connect Client



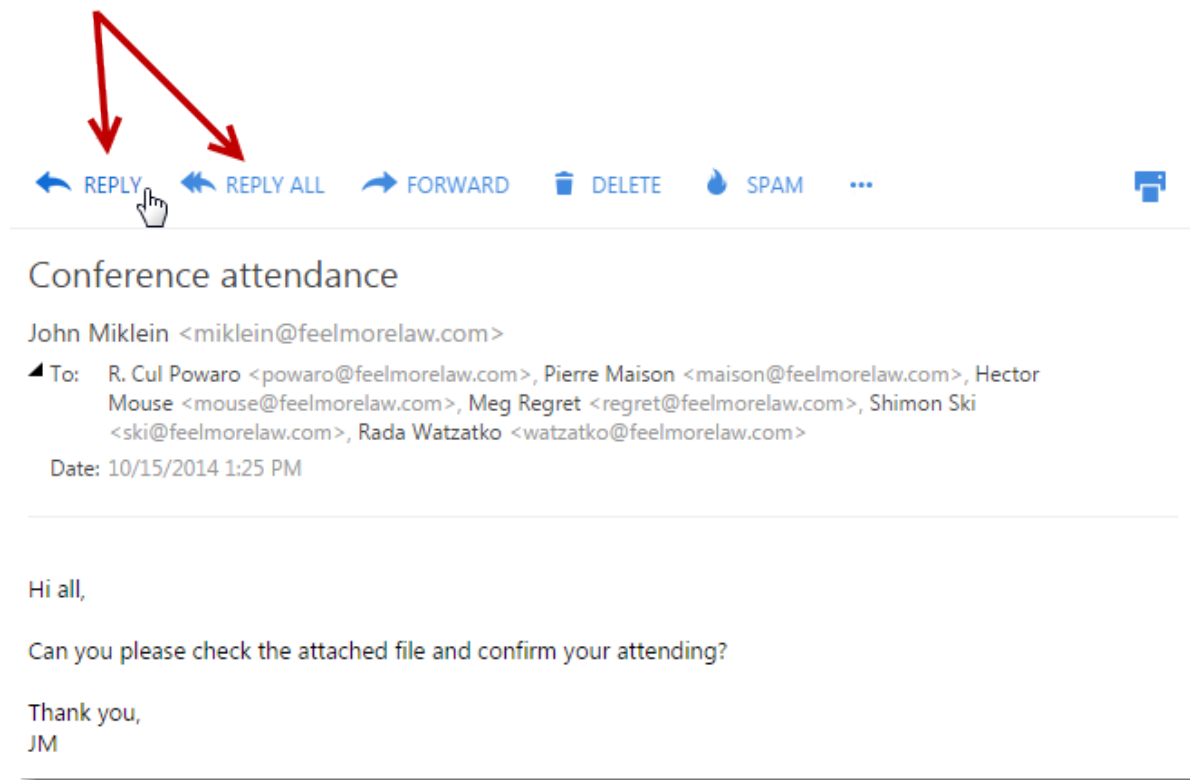
- Ask your administrator to add a new email address in your Kerio Connect account settings.

Replying to messages

To reply to a message, click **Reply**.

If the message has multiple recipients and you want to send your reply to all of them, click **Reply All**.

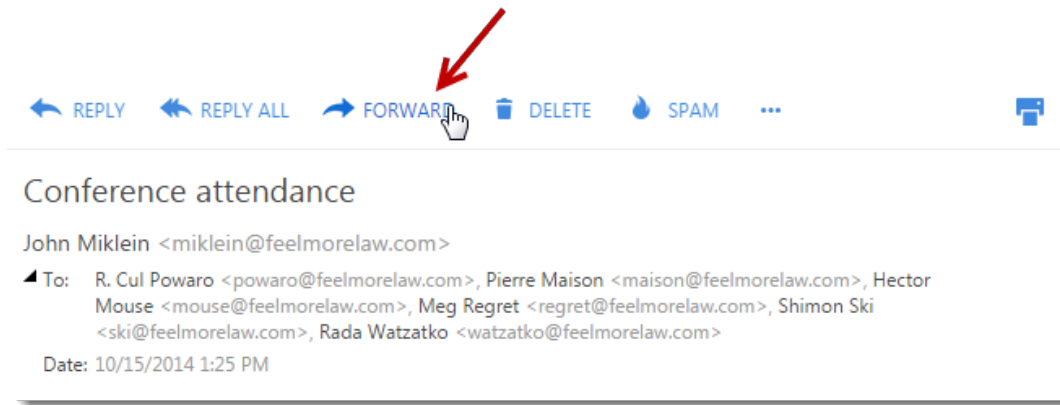
Kerio Connect Client automatically adds “Re:” before the message subject and copies the original message into the message body.



Forwarding messages

If you want to send a message you’ve received to a third person, you can forward the message.

1. Select the message you want to forward.
2. Click **Forward**.



This opens a new message window. Kerio Connect Client automatically adds “Fwd:” before the message subject and copies the original message into the message body.

3. Add recipients as needed.
4. (Optional) Add your own message above the forwarded message.
5. Click **Send**.

The message appears in your **Sent** folder with the date and time.



To resend a message with the original subject and message body (no Fwd: before the subject), right-click a message and select **Edit as New**. This opens an editing window where you can add recipients and edit the message (see [Composing new messages](#) above).

Creating calendar events from messages

You can create a calendar event and invite all the message recipients and senders to the event. See [Using calendars in Kerio Connect Client](#).

Sharing email folders

You can share your email folders and display emails others share with you. To learn how, read [Sharing in Kerio Connect](#).

Sorting email messages in Kerio Connect Client

About sorting

In Kerio Connect Client, you can:

- Sort messages within individual folders using different criteria
- Sort received messages into different folders using rules you set up

Sorting messages within a folder

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

Kerio Connect Client remembers your preferences in each individual folder.

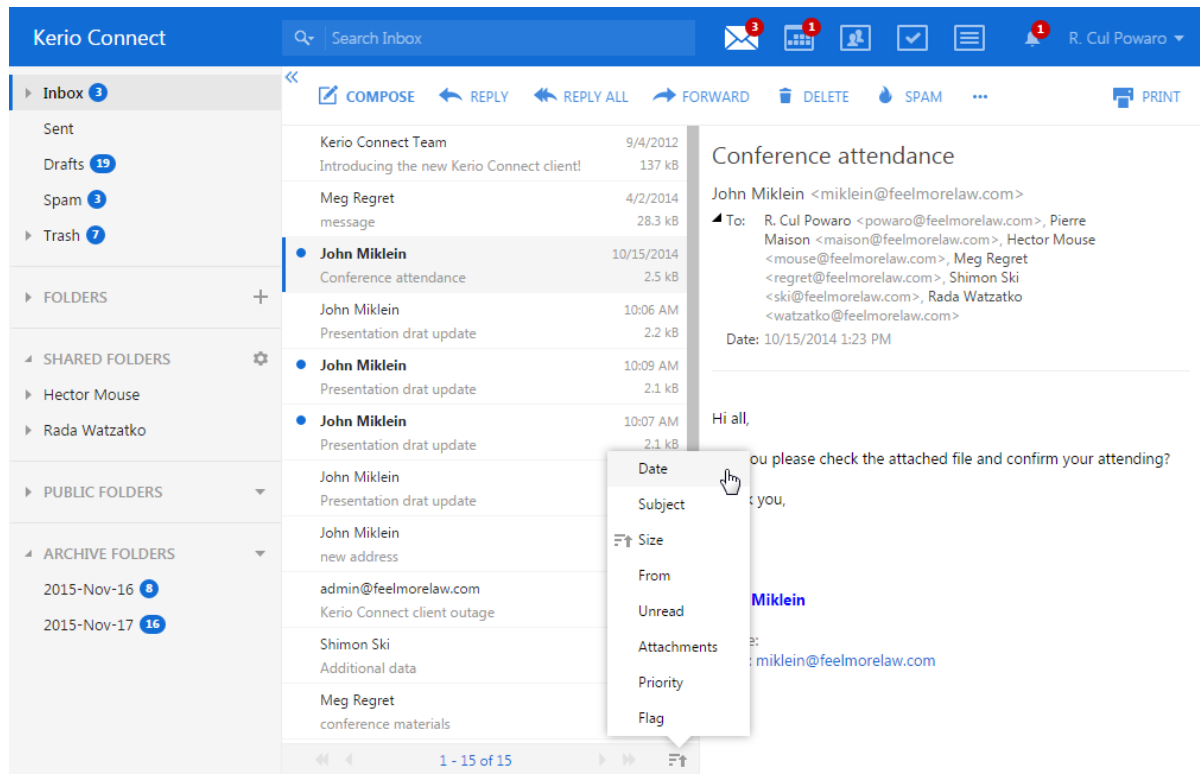
Preview pane on the right

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



2. Click the Sorting icon in the bottom bar.
3. Select how you want to sort the messages.
4. To sort messages in the reverse order, repeat the same procedure.

For example, if you sorted messages by date, with the most recent on top, click **Date** again to list them with the oldest on top.



Preview pane on the bottom or hidden

1. To sort messages, click any header in the message list.
2. To reverse the order, click the same header again.

Sorting messages into folders

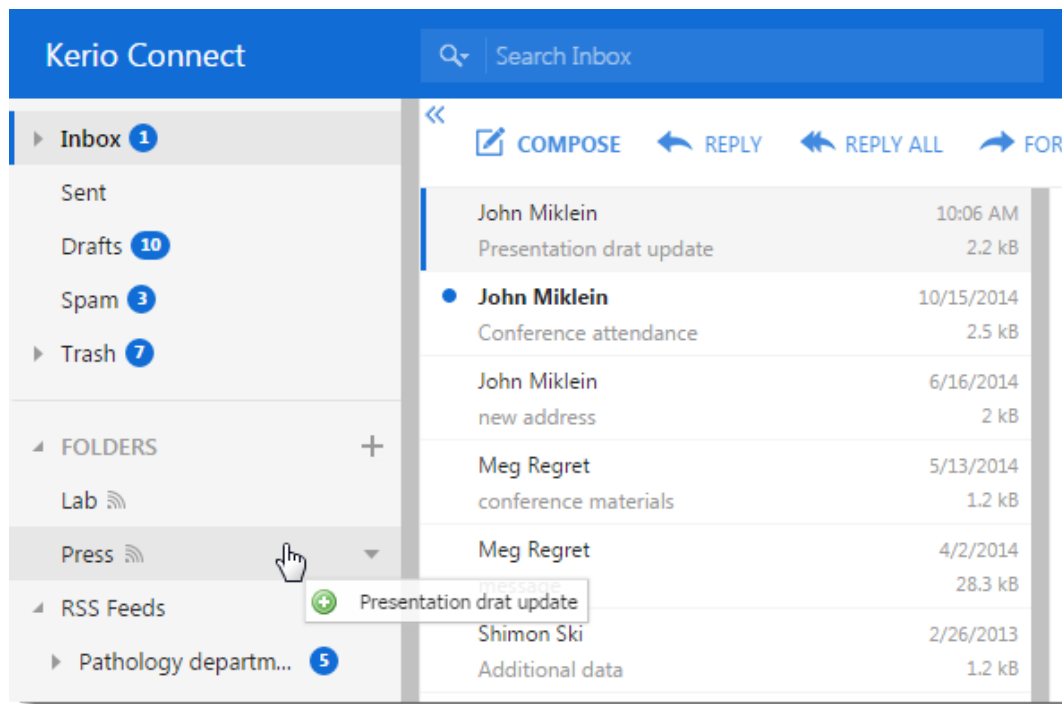
Messages delivered to Kerio Connect Client are stored in the **Inbox** folder.

If you have additional folders, you can move messages in three different ways:

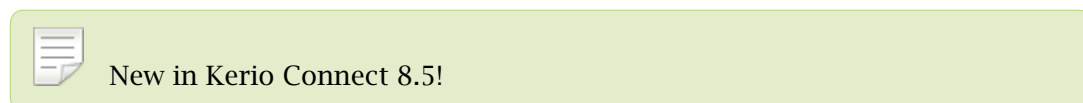
Drag messages

You can drag messages to another folder.

Sorting email messages in Kerio Connect Client

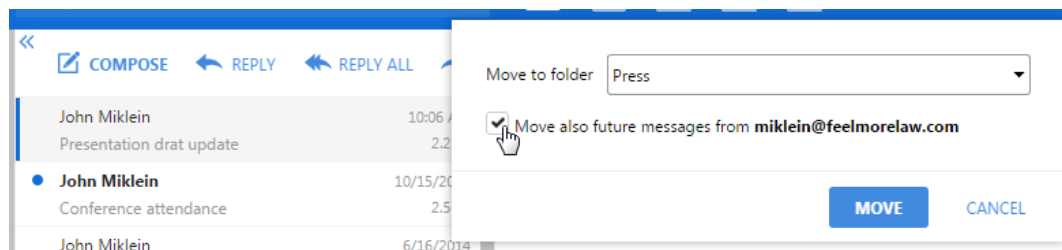


Use the context menu



Right-click a message, click **Move** and select a destination folder.

Select the **Move also future messages from** checkbox to create a filter rule for messages from the same sender.



Create filters

Create filters with various conditions to move them automatically.

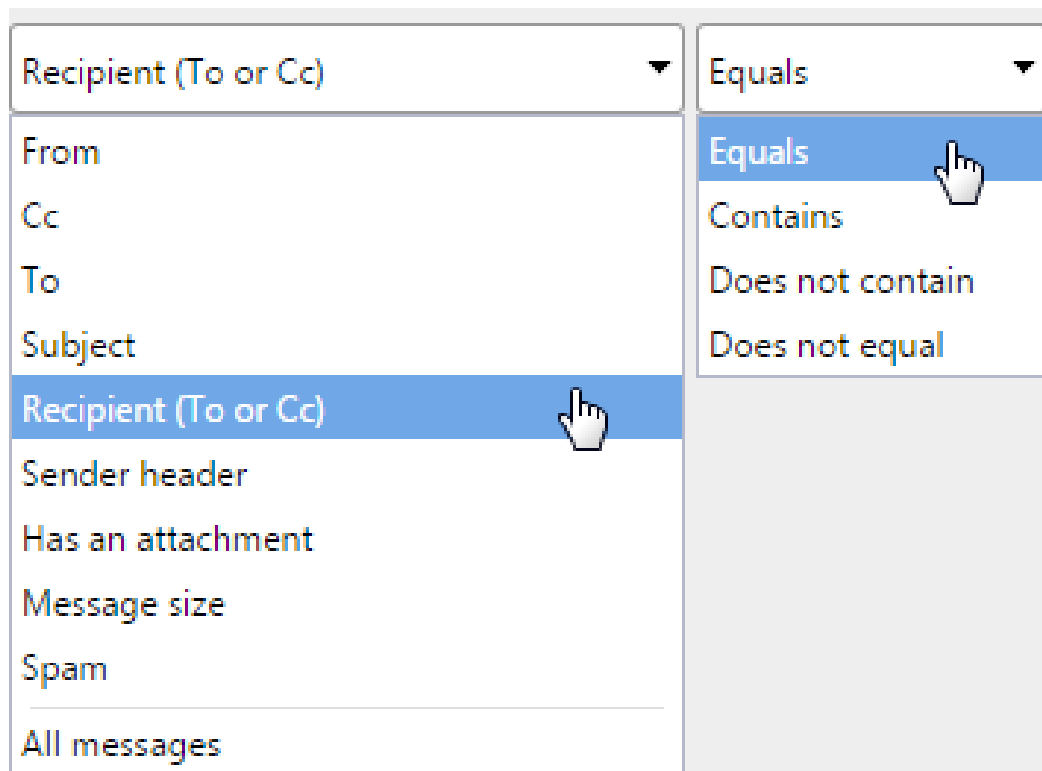
Creating filters

To automatically sort messages into folders or forward them to another address, use filters.

The order of the filters is important (see [Arranging the order of filters](#) below).

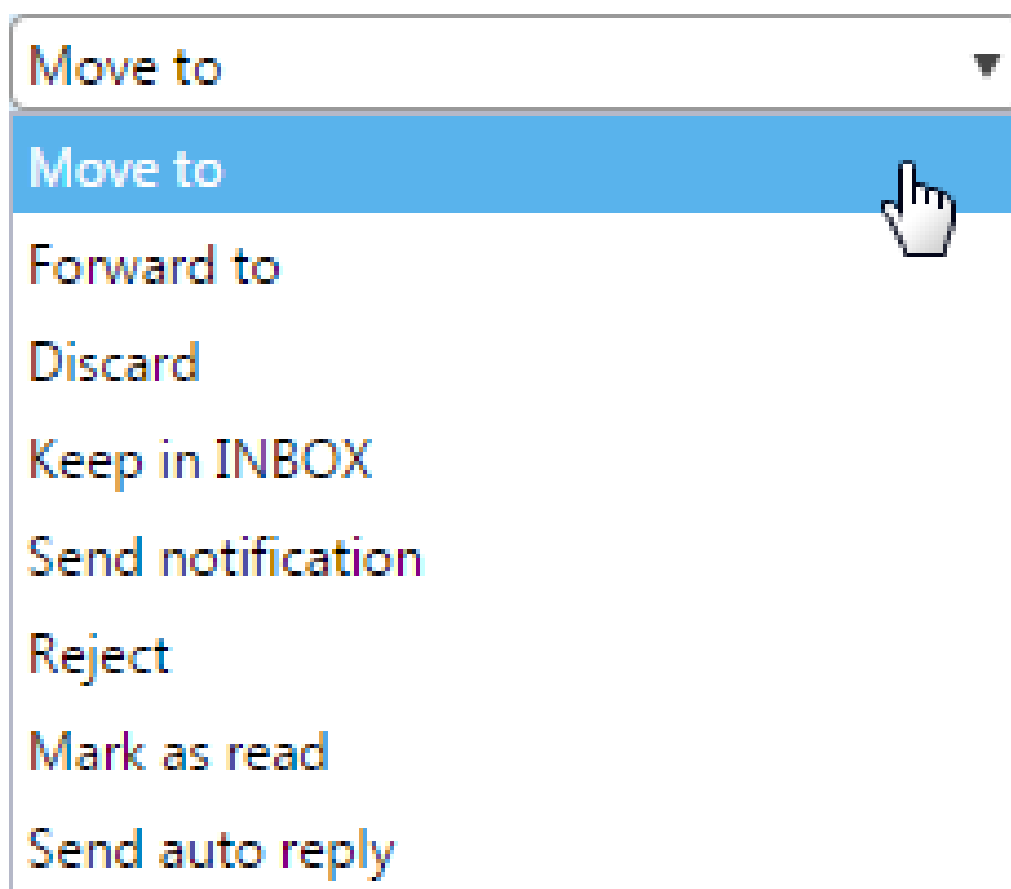
1. Click your name in Kerio Connect Client and select **Settings**.
2. In the **Filters** section, **New filter**.

3. Type a name for the filter.
4. Set the conditions for the filter.

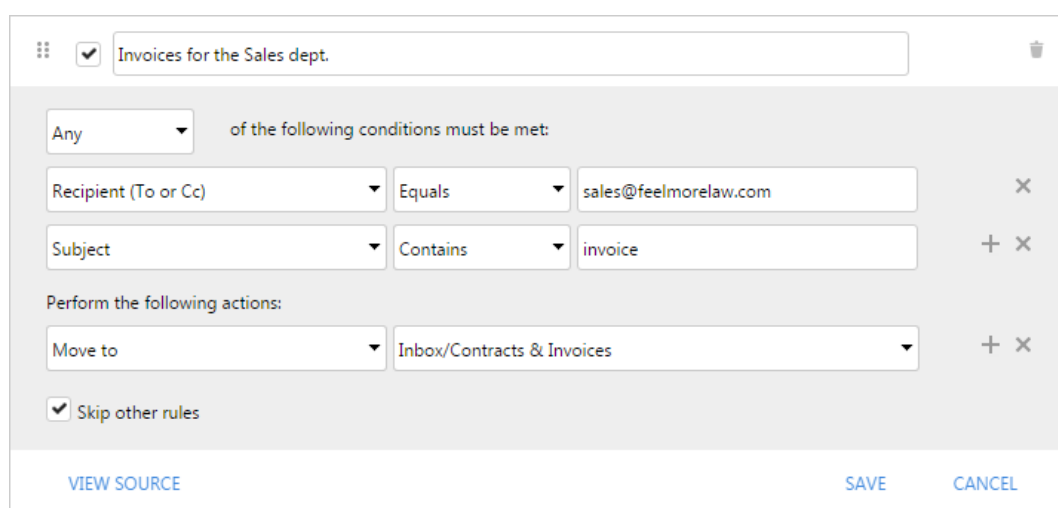


Use a comma (,) or semi-colon (;) to separate multiple items (see [Example 3](#) below).

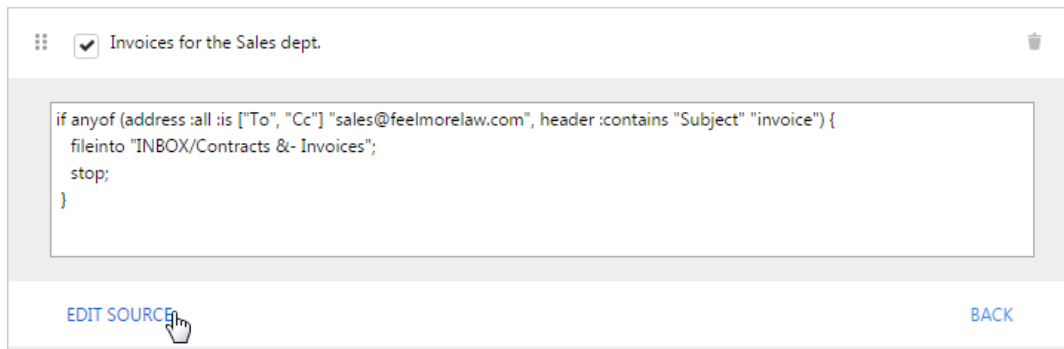
5. Set the action to be taken.



6. You can also select the **Skip other rules** option (see below).



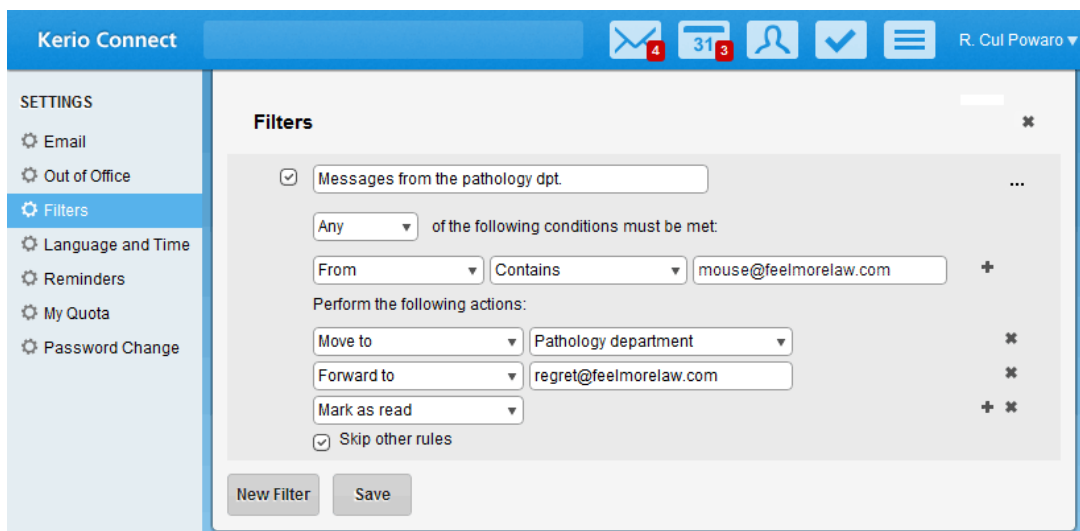
- You can edit the Sieve script of the rule by clicking on **View Source** → **Edit Source**.



- Save your settings.

Kerio Connect 8.4 and older

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



Sorting email messages in Kerio Connect Client

5. For each filter, you can also check the **Skip other rules** option (see below).
6. Save your settings.

Arranging the order of filters

The order of filters is important. The filter at the top of the list is applied first.

You can drag & drop filters to sort the list.

If you check the **Skip other rules** option, no further filters are applied when the filter's action is executed.

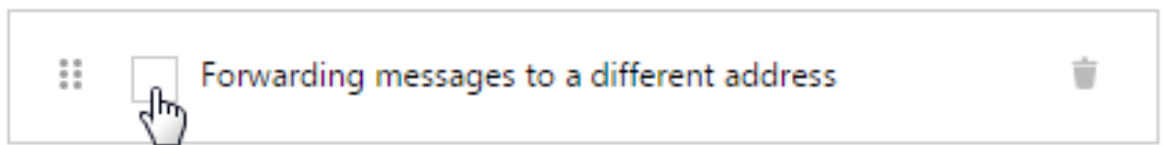
See [Example 1](#) below.

Editing and deleting filters

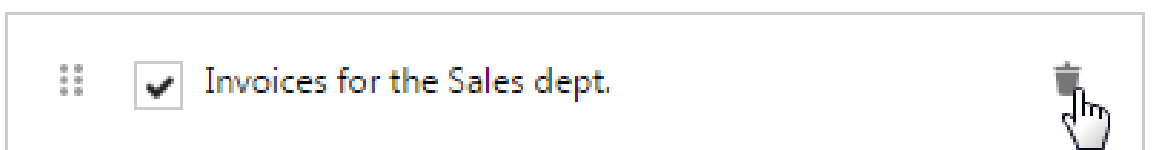
Click a filter to display it.

Double-click a filter to edit it.

To disable a filter temporarily, unselect the filter checkbox.



To delete a filter, click the **Trash** icon next to the filter name.

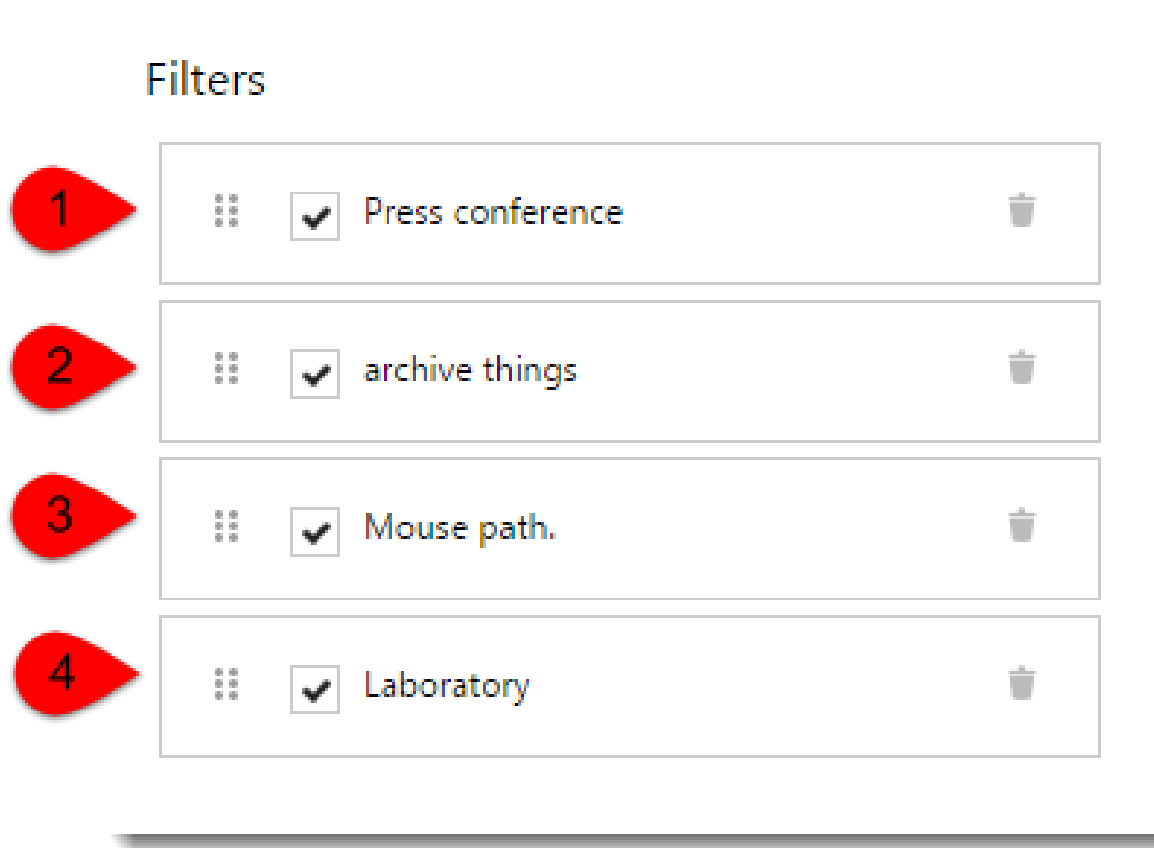


For Kerio Connect Client 8.4 and older, hover your mouse over a rule and click the edit or delete icons.

Examples of filtering rules

Example 1: Order of filters

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

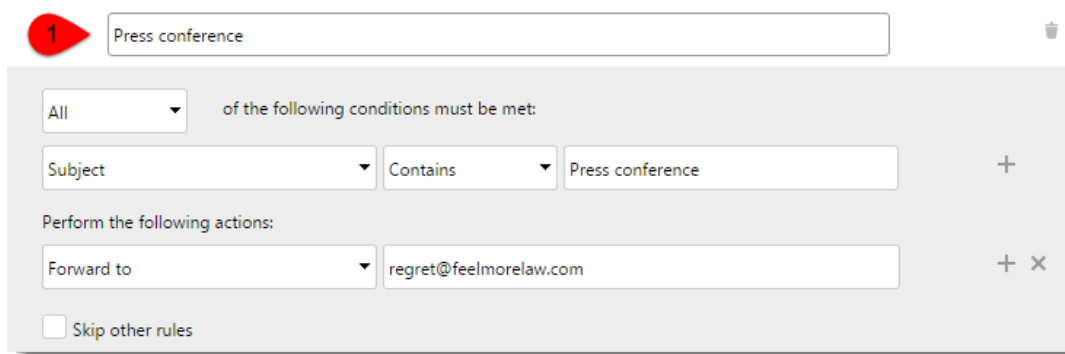


Kerio Connect checks the filters from 1 to 4:

1. Filter 1 forwards messages with subject Press conference to regret@feelmorlaw.com.

As the subject **is not** Press conference, this filter does not apply and Kerio Connect continues to filter 2.

Sorting email messages in Kerio Connect Client



1 Press conference

All of the following conditions must be met:

Subject Contains Press conference +

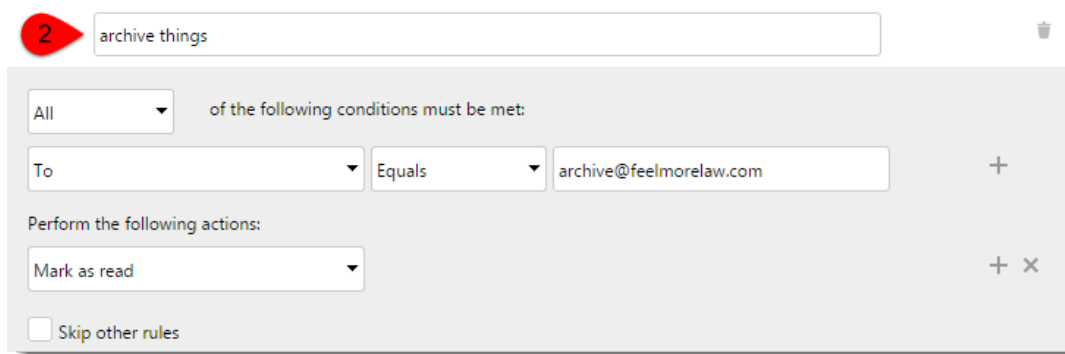
Perform the following actions:

Forward to regret@feelmorlaw.com + x

☐ Skip other rules

2. Filter 2 marks messages from archive@feelmorlaw.com as read.

As the sender is **not** archive@feelmorlaw.com, this filter does not apply and Kerio Connect continues with filter 3.



2 archive things

All of the following conditions must be met:

To Equals archive@feelmorlaw.com +

Perform the following actions:

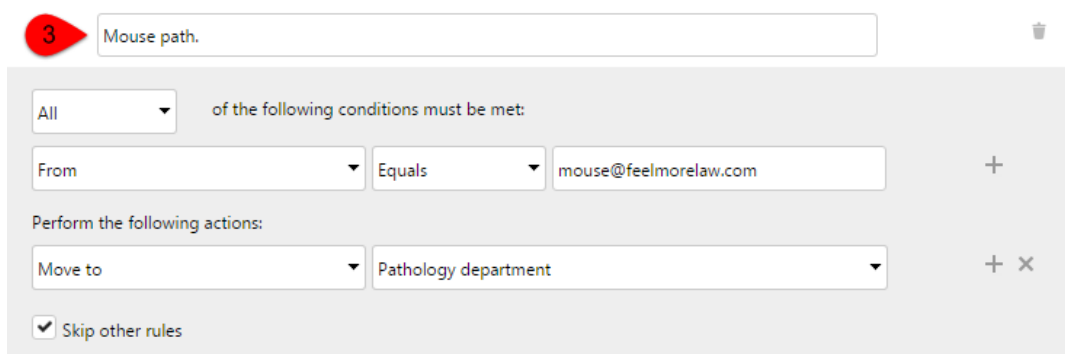
Mark as read + x

☐ Skip other rules

3. Filter 3 moves messages from mouse@feelmorlaw.com to folder Pathology department.

This condition is met. The message is moved to folder Pathology department.

In the filter 3 definition, the option **Skip other rules** is checked, so Kerio Connect applies filter 3 and skips the other filters.



3 Mouse path.

All of the following conditions must be met:

From Equals mouse@feelmorlaw.com +

Perform the following actions:

Move to Pathology department + x

☒ Skip other rules

Example 2: Forwarding incoming messages to another email address

Creating a filter for forwarding incoming messages to another address.

The screenshot shows a rule configuration window titled "Forwarding messages to a different address". At the top, there is a checkbox that is checked. Below the title, a dropdown menu is set to "All", followed by the text "of the following conditions must be met:". Under this, there is a dropdown menu set to "All messages". Below the conditions section, the text "Perform the following actions:" is displayed. There are two action items: "Forward to" with a dropdown menu set to "regret@feelmorrelaw.com", and "Keep in INBOX" with a dropdown menu set to "INBOX". To the right of these actions are plus and minus icons. At the bottom, there is a checked checkbox labeled "Skip other rules".

Example 3: Adding multiple entries to an item in the rule

If you want to add **multiple entries** to an item, use a comma (,), or a semi-colon (;).

Messages from the address sales@feelmorrelaw.com which contain the words contract or invoice in the subject are moved to folder Contract & Invoices.

The screenshot shows a rule configuration window titled "Contracts or invoices from the Sales dept.". At the top, there is a checked checkbox. Below the title, a dropdown menu is set to "All", followed by the text "of the following conditions must be met:". There are two conditions: "From" with a dropdown menu set to "Contains" and a text box containing "sales@feelmorrelaw.com", and "Subject" with a dropdown menu set to "Contains" and a text box containing "contract,invoice". To the right of these conditions are plus and minus icons. Below the conditions section, the text "Perform the following actions:" is displayed. There is one action item: "Move to" with a dropdown menu set to "Inbox/Sales/2014/January". To the right of this action is a plus and minus icon. At the bottom, there is a checked checkbox labeled "Skip other rules".

Using calendars in Kerio Connect Client

Overview

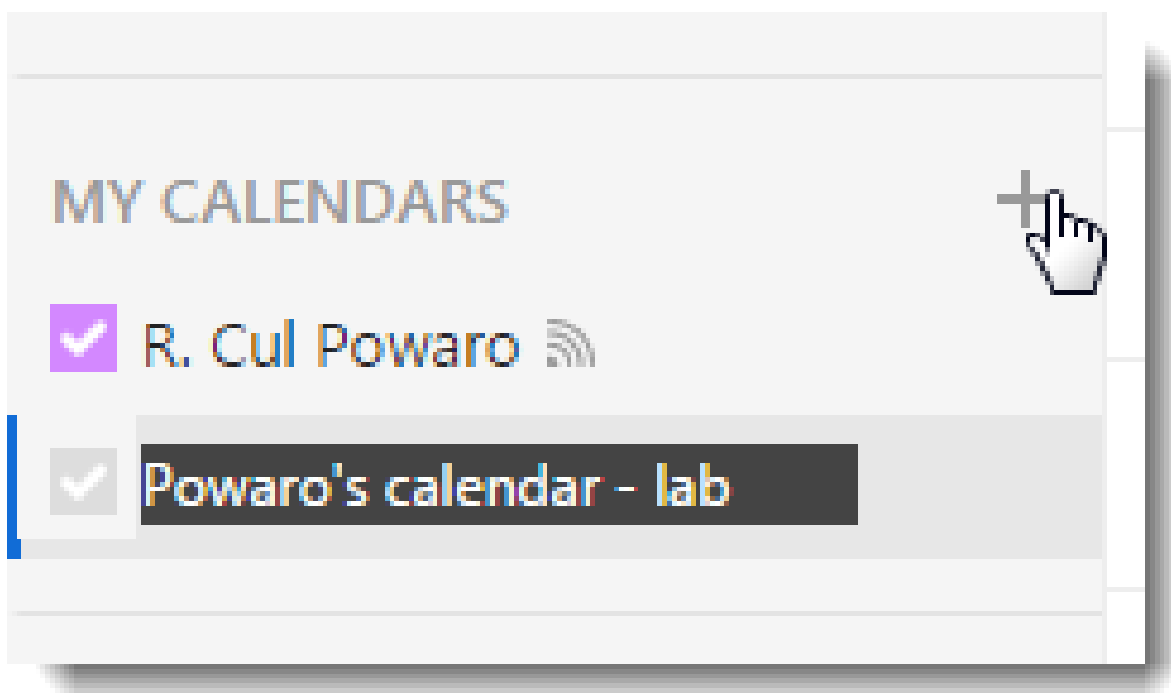
In Kerio Connect Client, you can create and manage calendars where you can keep track of all your professional and personal events.

Creating calendars

By default you have one calendar in Kerio Connect Client.

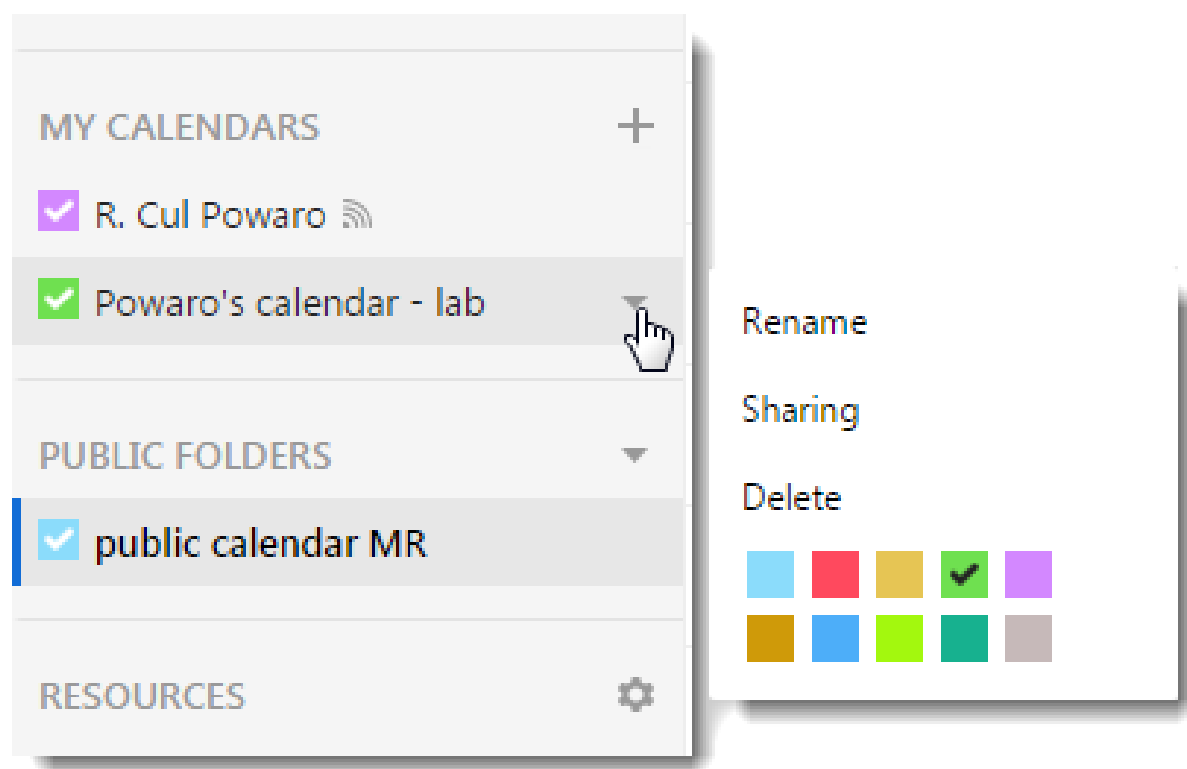
To create additional calendars:

1. In your Kerio Connect Client, go to the **Calendars** section.
2. Click the plus sign next to the **My Calendars** label.
3. Type a name for the new calendar.



Click the arrow next to the calendar name to:

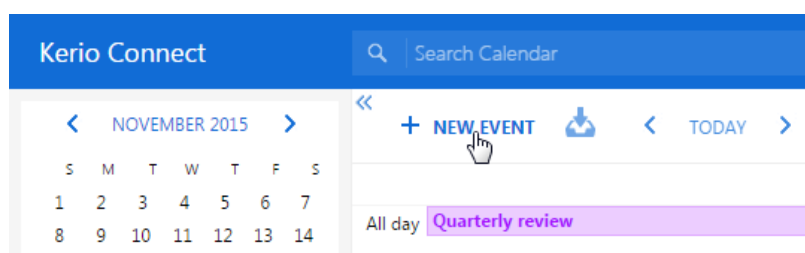
- Rename, [share](#), or delete the calendar
- Select the color Kerio Connect Client uses to display events in this calendar



Creating events

To create events:

1. In your Kerio Connect Client, go to the **Calendars** section.
2. In the calendar grid, find the date you want to create an event for. Then:
 - Double-click the grid, or
 - Drag your mouse over the calendar grid, or
 - Click **New event**.



Using calendars in Kerio Connect Client

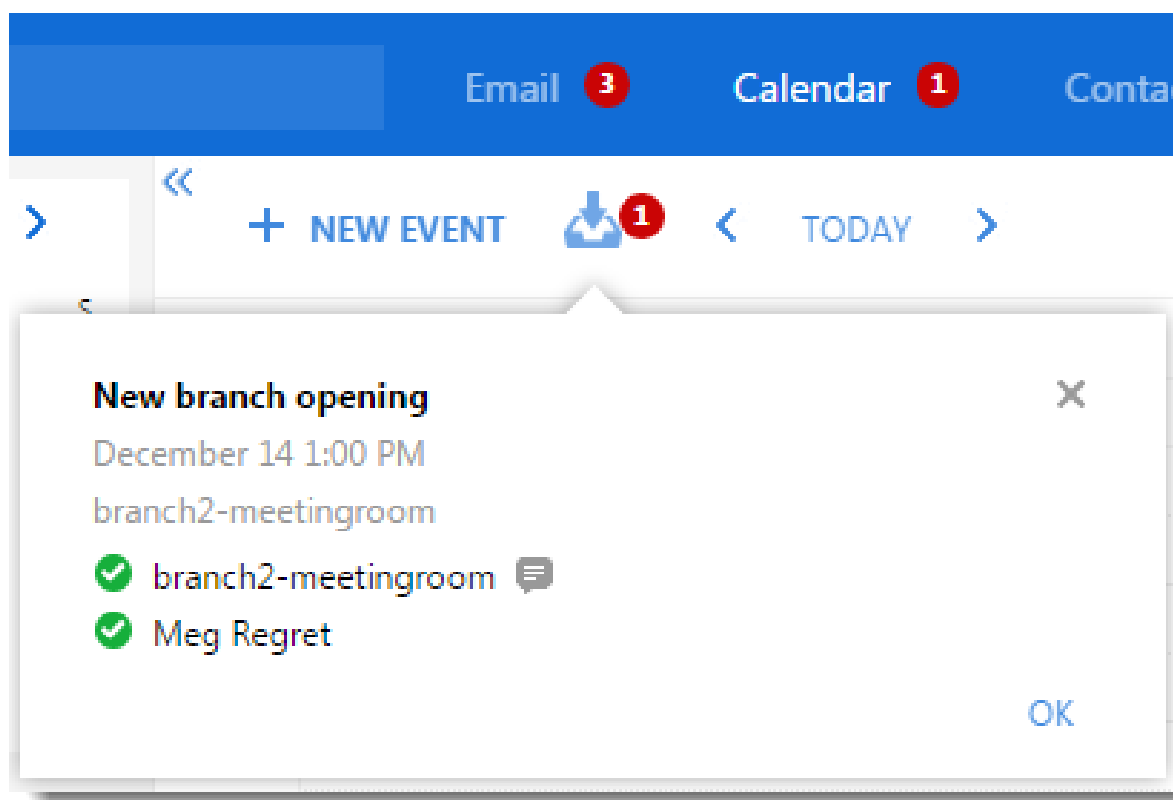
3. In the New Event window:

- Type the name of the event
- Specify where the meeting takes place (see [Scheduling resources in Kerio Connect Client](#))
- Specify the date and time of the event
- Invite attendees (to check their calendars for availability, click **Find meeting time**)
- Set up a [recurring event](#)
- Specify the [time required for traveling](#) to the event location
- Set a reminder time for the event
- Label the event
- Select a calendar to display the event in (this must be a calendar you created or a calendar [you are a delegate of](#))
- Mark the [event as private](#)

The screenshot shows the 'New Event' window in Kerio Connect Client. The main form is titled 'New branch opening'. The 'Where' field is set to 'branch2-meetingroom'. The 'Start' date is '12/14/2015' at '1:00 PM', and the 'End' date is '12/14/2015' at '2:00 PM'. The 'Attendees' list includes 'Meg Regret' and 'John Miklein'. The 'Repeat' field is set to 'None'. The 'Travel time' is '30 minutes'. The 'Reminder' is '15 minutes'. The 'Label' is 'Business'. The 'Show As' is 'Busy'. The 'Calendar' is 'R. Cul Powaro'. The 'Private' checkbox is unchecked. The 'Description' field contains the text: 'Issues to address: - new equipment to buy - new hires - plans for the next quarter'. Several dropdown menus are open, showing options: '15 minutes' (selected), 'None', 'When I need to leave', 'On event start', '5 minutes', '30 minutes', '1 hour', '2 hours', '4 hours', 'on the same day at 9:00 AM', 'a day before at 9:00 AM', 'two days before at 9:00 AM', 'a week before at 9:00 AM'; 'Business' (selected), 'None', 'Important', 'Personal', 'Vacation', 'Must Attend', 'Travel Required', 'Needs Preparation', 'Birthday', 'Anniversary', 'Phone Call'; 'branch2-meetingroom' (selected), 'alpha-meeting-room', 'branch2-meetingroom', 'branch2-parking1', 'interrog', 'interrog2', 'interrogationroom1', 'meeting_room_1', 'officepowaro', 'officeregret'; 'None' (selected), 'Daily', 'Weekly', 'Monthly', 'Yearly'; 'minutes' (selected), 'minutes', 'hours'; 'Busy' (selected), 'Free', 'Tentative', 'Out of office'; 'R. Cul Powaro' (selected), 'R. Cul Powaro', 'Powaro's calendar - lab', 'public calendar MR (public folder)'. Red arrows point from the list items to the corresponding dropdown menus.

4. Click **Send**.

When someone accepts or declines your invitation, Kerio Connect displays the information in the notification area in the top bar.



Specifying travel time



New in Kerio Connect 8.5!

If you need some time to travel to an event, you can specify the time for individual events:

1. Double-click an event.
2. Specify the time in the **Travel time** section.

New branch opening

Where branch2-meetingroom

Start 12/14/2015 1:00 PM

End 12/14/2015 2:00 PM

Attendees R. Cul Powaro (organizer)
Meg Regret
John Miklein

Repeat None

Travel time 15 minutes

Reminder 30 minutes

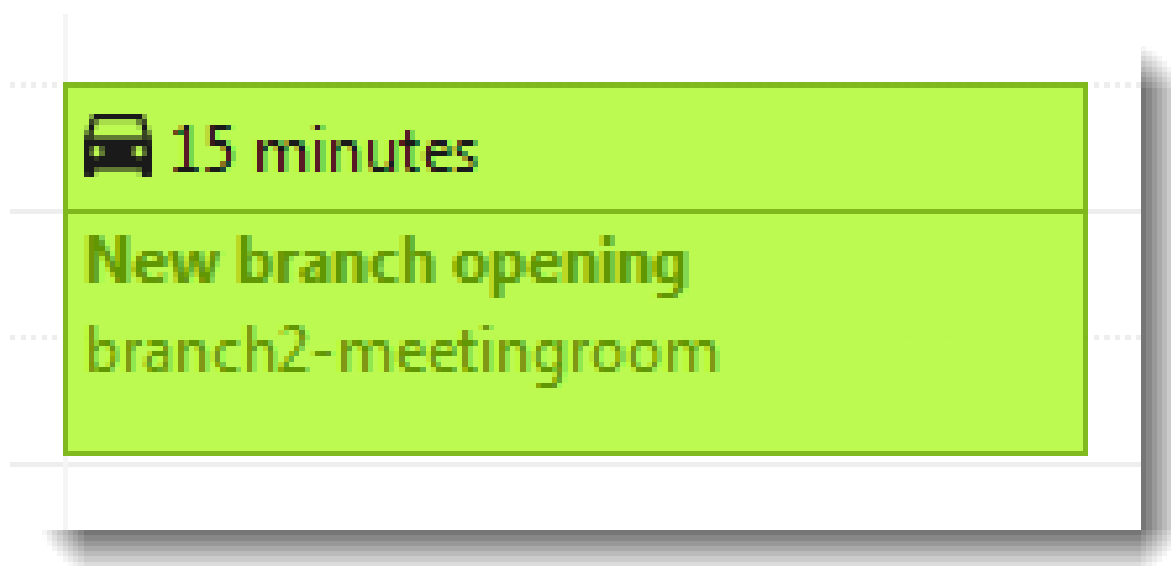
Label ☒ None

Show As Busy

Calendar ☒ Meg Regret

3. Save the event.

Kerio Connect Client then displays the time in your calendar.



Travel time settings are specific for each user:

- You cannot set travel time for other users
- Other users' settings are not displayed in your calendar

Repeating events

If you have a weekly meeting, you can set up a repeating event in Kerio Connect Client.

To create a recurring event:

1. Create a new event as described above.
2. Select the repeat frequency from the drop-down menu.
3. Click the cog wheel icon.
4. Based on your choice in step 1, you can set detailed options for the repeating event.

Using calendars in Kerio Connect Client

Team meeting

Where ☒ officepowaro

All day event ☐

Start 12/14/2015 9:00 AM

End 12/14/2015 10:00 AM

Attendees ☒ Meg Regret
☒ John Miklein

[Find meeting time...](#)

Repeat Weekly

on Monday and Wednesday

Travel time 0 minutes

Reminder 15 minutes

Label Must Attend

Show As Busy

Calendar R. Cul Powaro

Every 1 week(s)

On

☒ Monday ☐ Saturday

☐ Tuesday ☐ Sunday

☒ Wednesday

☐ Thursday

☐ Friday

Ends

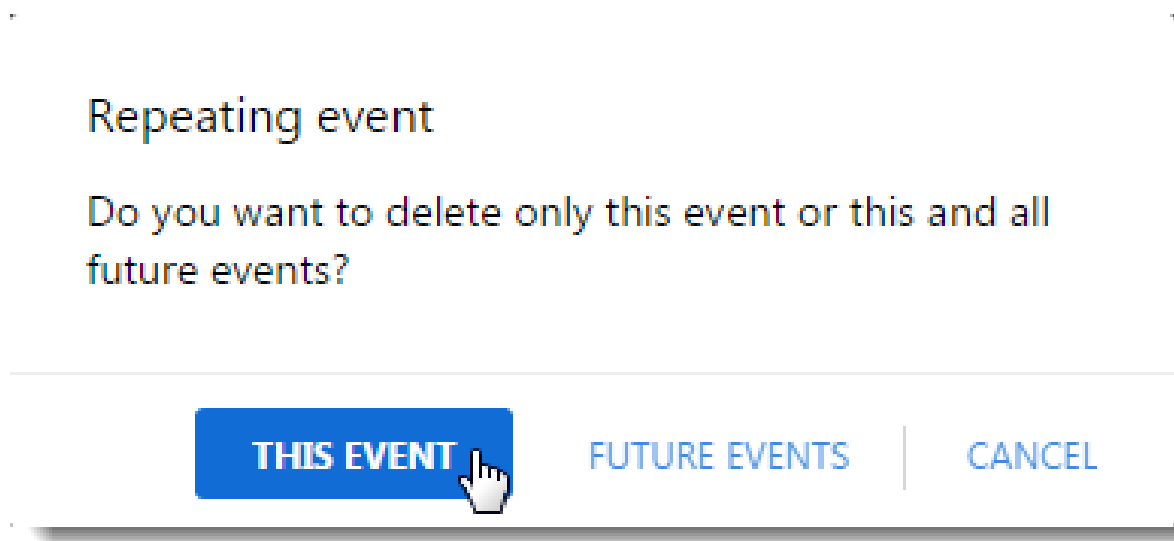
☒ Never

☐ On M/D/YYYY

Changing repeating events

You can change a single event in the series, or all future events in the series.

1. Double-click a repeating event.
2. Change the event and click **Save**.
3. Click **This Event** to change a single event, or click **Future Events** to change also all future events.



Creating private events

If you mark an event as private, the details of the event stay hidden to users you share the calendar with and to delegates — they can only see your free/busy information.

To mark an event as private, select the **Private** option in the event settings.

Lunch with wife

Where

Le Restaurant

All day event

☐

Start

12/16/2015

12:00 PM

End

12/16/2015

1:30 PM

Attendees

Enter name or email

Repeat

None

Travel time

15

minutes

Reminder

30 minutes

Label

None

Show As

Out of office

Calendar

R. Cul Powaro

Private

☒

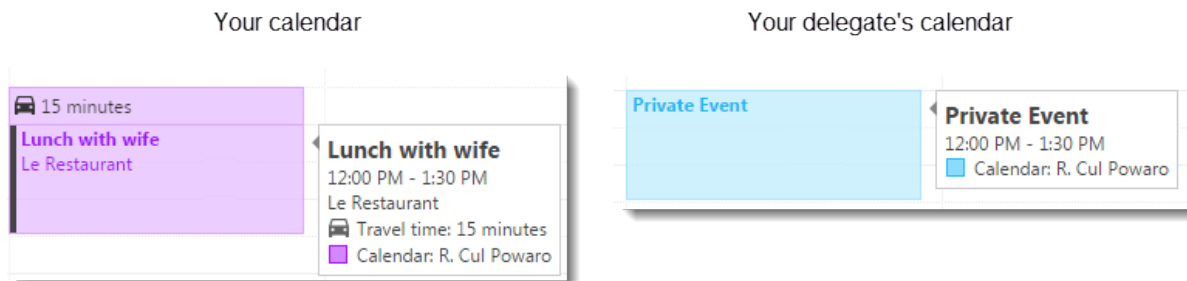
Description

PRINT

SAVE

CANCEL

The image below shows how the event looks in your calendar and in the calendar of your delegate.

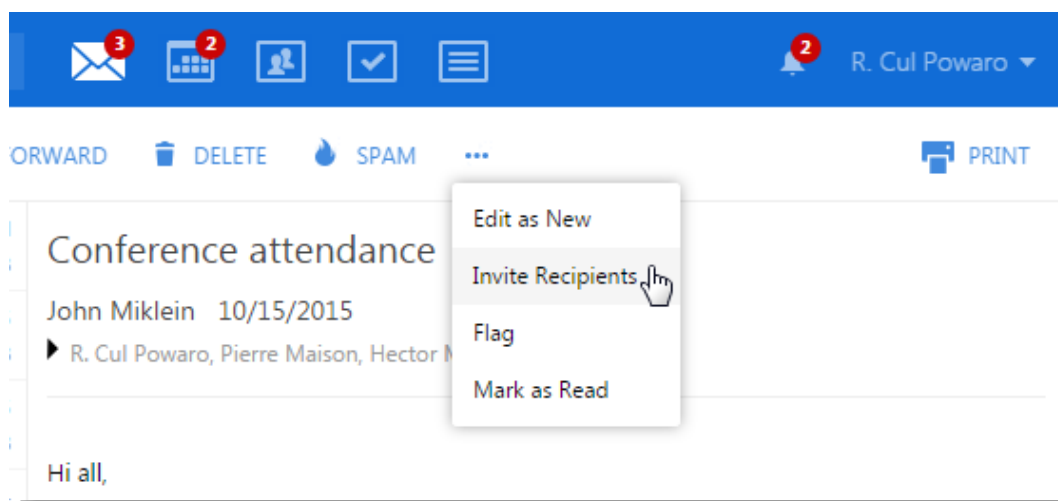


Creating events from email messages

In the **Emails** section, you can create an event and invite all the recipients and senders of a message.

1. In the **Emails** section, select a message and click **More** → **Invite Recipients**.

This takes you to the Calendar section.



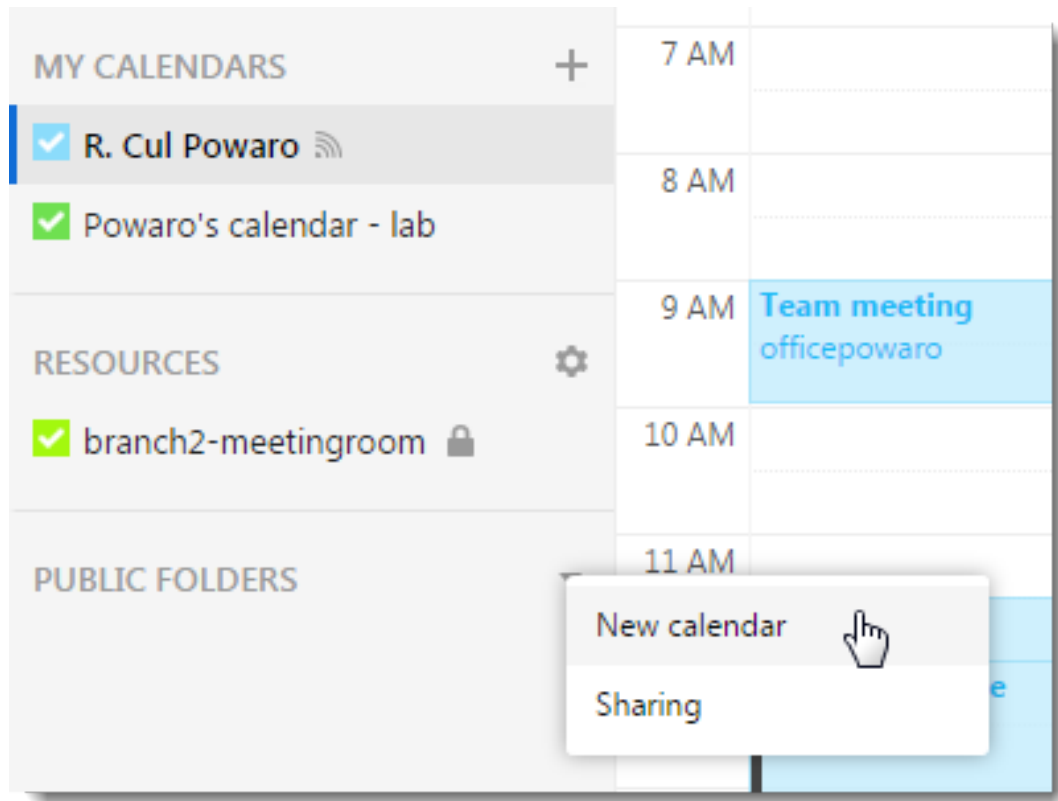
2. [Edit the event](#) as described above.
All the recipients and senders from the messages are included as attendees.
3. Save the event.

Creating and displaying public calendars

Any user can display public calendars.

To create public calendars, you must be a [public folder administrator](#).

1. In your Kerio Connect Client, go to the **Calendars** section.
2. Click the arrow next to **Public Folders** and select **New calendar**.

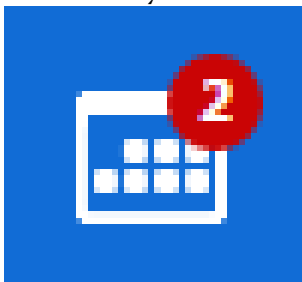


3. Type the name of the calendar.

If a public calendar is available, it's automatically displayed in the **Calendar** section of all users under **Public Folders**.

Accepting invitations

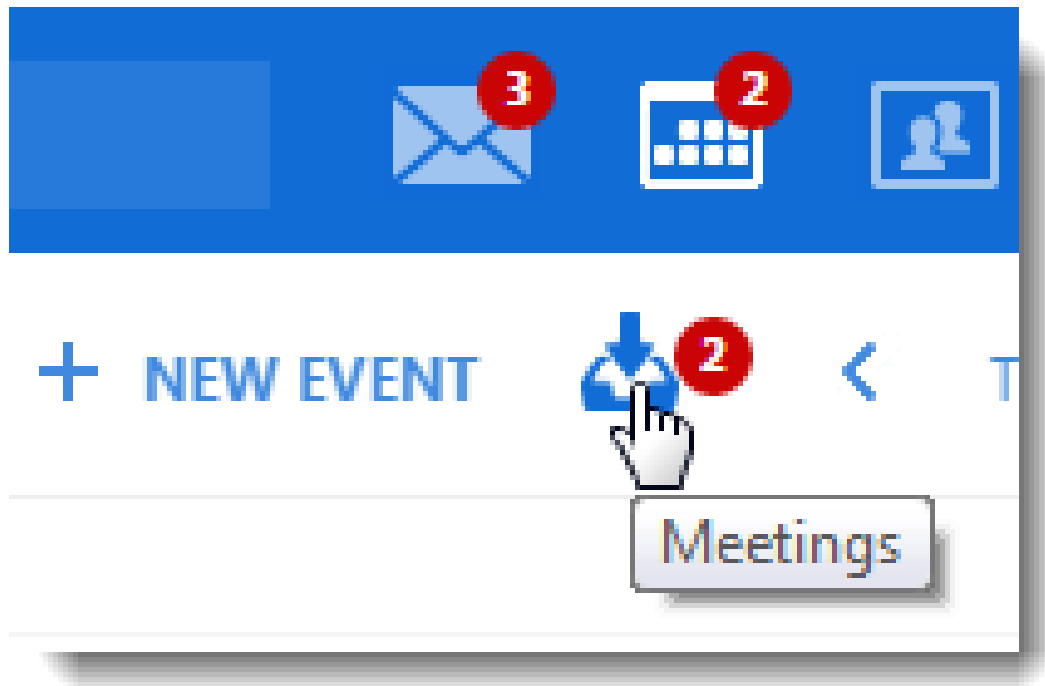
When someone invites you to a meeting, Kerio Connect Client displays a number on the



Calendar tab or a [notification](#).

When you receive an invitation:

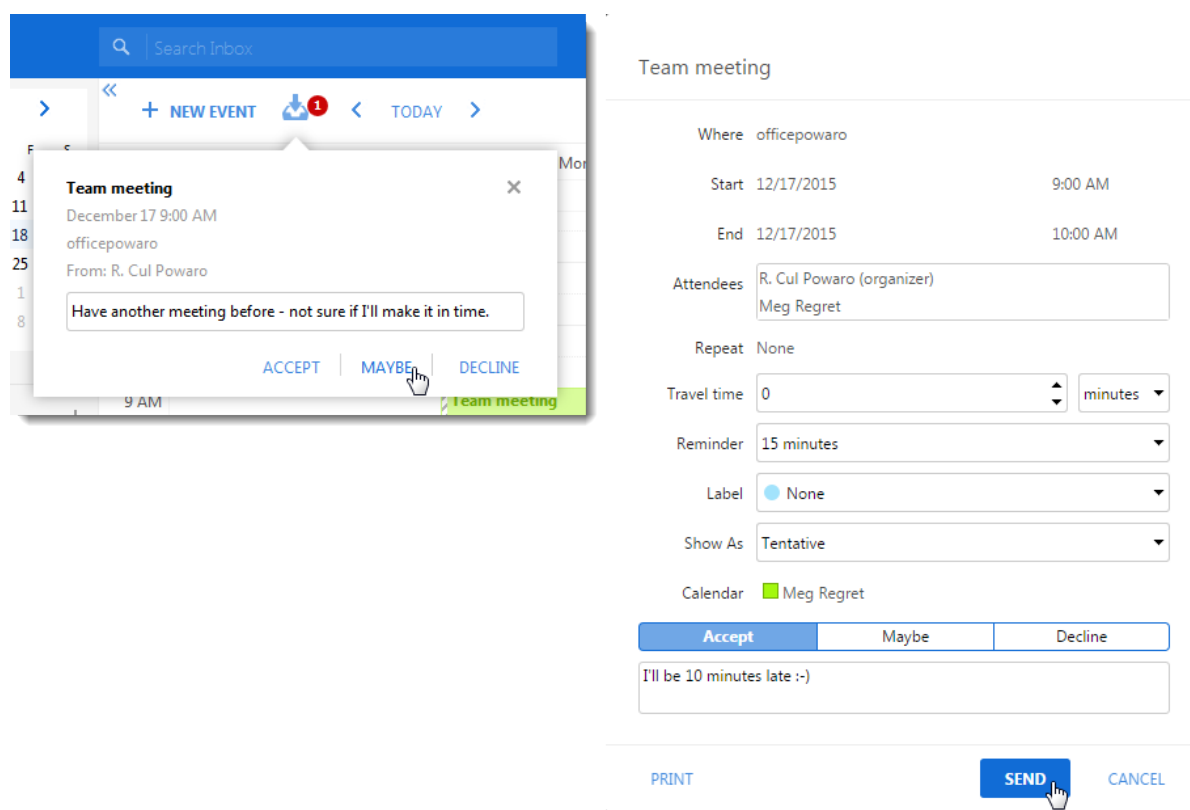
1. In your Kerio Connect Client, go to the **Calendars** section.
2. Click the **Meetings** icon.



3. (Optional) Write a response to the sender.
4. Click **Accept**, **Maybe** or **Decline**.

To change your decision later, reopen the event, change your status, and click **Send**.

Using calendars in Kerio Connect Client



Selecting viewing mode

You can view Kerio Connect Client calendars in four different ways:

- **Day** view displays a single day.
- **Week** view displays a whole week.

The starting day is based on your [selected locales](#).

-

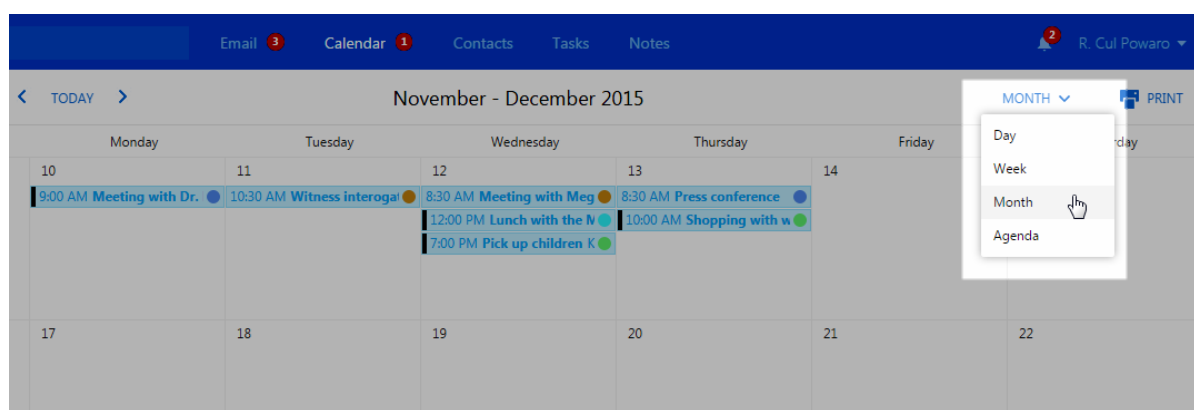


New in Kerio Connect 9!

Month view displays 5 weeks in your calendar.

In Kerio Connect Client 8.5.3 and older, you can select the **Overview** mode which displays from two to six weeks in your calendar — you can use the plus and minus signs at bottom left to add or remove weeks from the view..

- **Agenda** displays a list of all events from the day you select onwards.



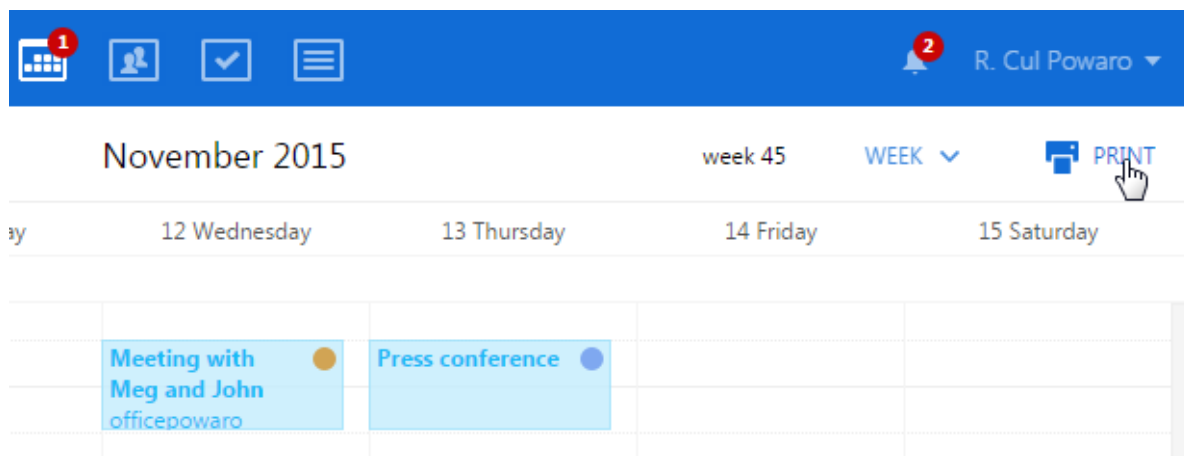
Printing calendars



New in Kerio Connect 8.5!

You can print any calendar in any viewing mode.

To print your calendar, click **Print** in the top right corner.



You can also print an event. Double-click an event and click the **Print** at the bottom.

Using calendars in Kerio Connect Client

The screenshot shows a web-based interface for managing calendars. At the top, there is a 'Show As' dropdown menu currently set to 'Busy'. Below this, a calendar entry is displayed for 'Meg Regret' with a green square icon. Underneath the entry are three buttons: 'Accept' (highlighted in blue), 'Maybe', and 'Decline'. At the bottom of the interface, there are three buttons: 'PRINT' (with a mouse cursor pointing at it), 'SAVE' (in a blue box), and 'CANCEL'.

You print calendars using the standard printing dialog in your browser. To print the different calendar colors and images, enable printing background graphics (colors and images) in your browser. Refer to your browser's documentation for detailed information.

Sharing calendars

To learn how to share your calendars and display calendars others share with you, read [Sharing in Kerio Connect](#).

Scheduling resources in Kerio Connect

Overview

Resources are meeting rooms and other facilities and equipment, such as cars and parking spaces.

You can [schedule resources](#) in an email client when creating new events in calendars.

Only administrators can create new resources (see [Configuring resources in Kerio Connect](#))

Scheduling resources in Kerio Connect Client

To schedule a resource:

1. Open your calendar.
2. Click **New Event**.
3. Configure the event.
4. For rooms and other locations, select the resource in the **Where** section or in the **Attendee** section.
5. For equipment, select the resource in the **Attendee** section.
6. Save the event.

The process is similar in other mail clients.

New branch opening

Where

✓ branch2-meetingroom

All day event

☐

Start

4/7/2016

1:00 PM

End

4/7/2016

2:00 PM

Attendees

✓ Meg Regret

✗ John Miklein

✓ car1

✓ branch2-parking1

Find meeting time...

Repeat

None

Travel time

30

minutes

Reminder

15 minutes

Label

● Business

Show As

Busy

Calendar

■ R. Cul Powaro

Private

☐

Description

Issues to address:
- new equipment to buy

PRINT

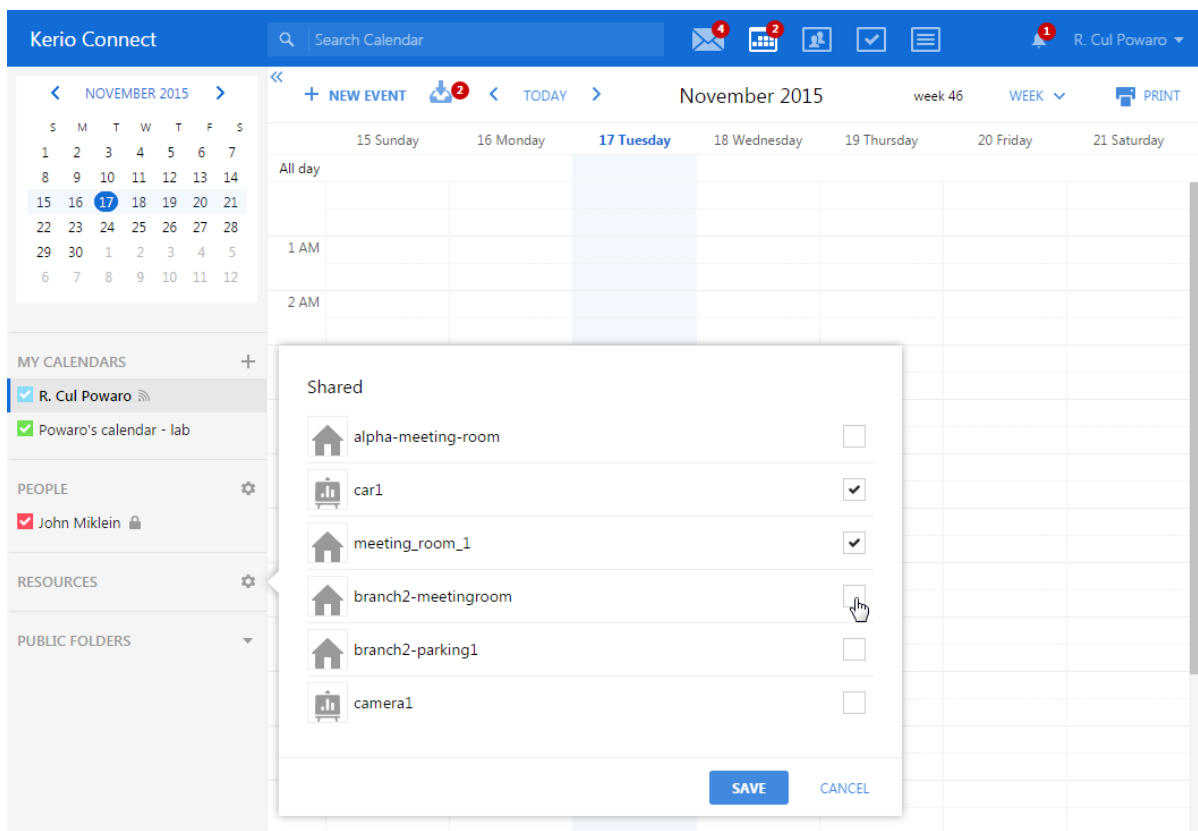
SEND

CANCEL

Displaying resource calendars in Kerio Connect Client

All [users who can schedule resources](#) can display the resource calendars. This can help when planning a meeting

1. Log in to your Kerio Connect Client and switch to **Calendars**.
2. Click the gear icon next to **Resources** on the left.
3. Select the resource calendar you want to display



Enabling notifications in Kerio Connect Client

Overview

Kerio Connect Client can remind you about:

- Upcoming events and tasks using [reminders](#)
- New emails, new chat messages, and upcoming events and tasks using [desktop notifications](#) or [pop-up notifications](#), depending on your browser



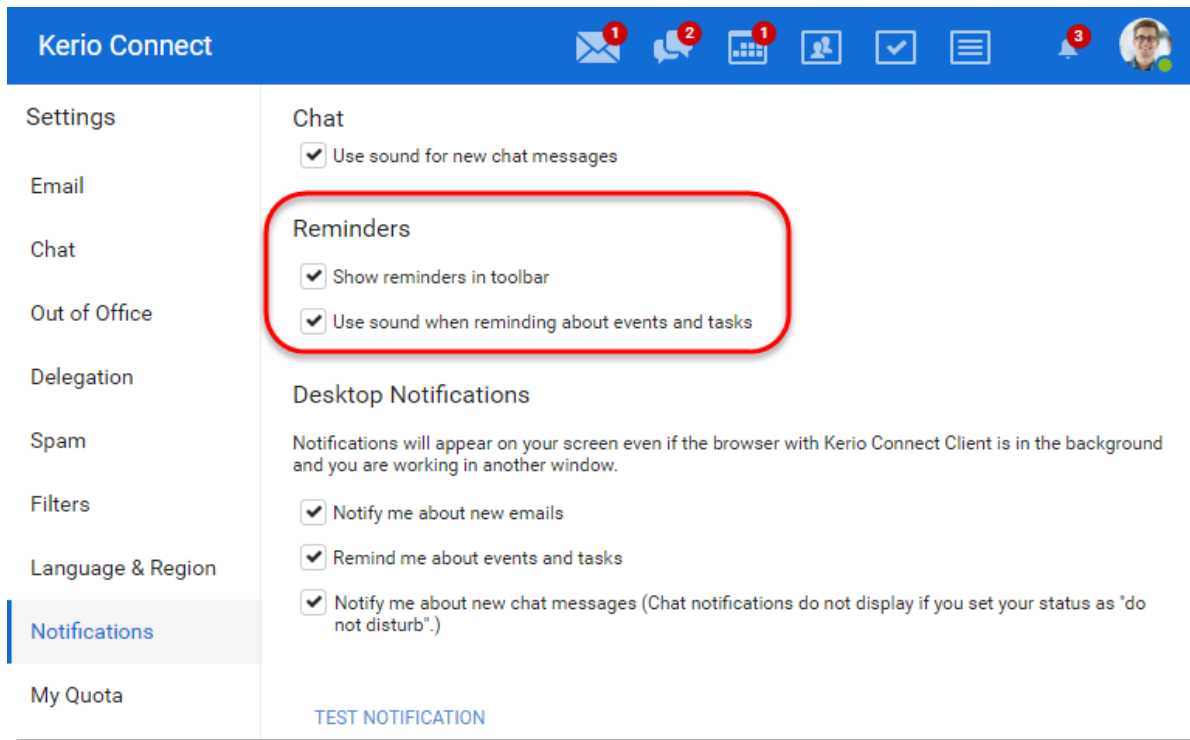
[Chat](#) is a new feature in Kerio Connect 9.1!

Event and task reminders in Kerio Connect Client 8.4 and newer

Kerio Connect Client can display reminders for your calendar events and tasks in the top bar.



These reminders are enabled by default. You can disable them in Kerio Connect client settings — unselect the option **Show reminders in toolbar**.

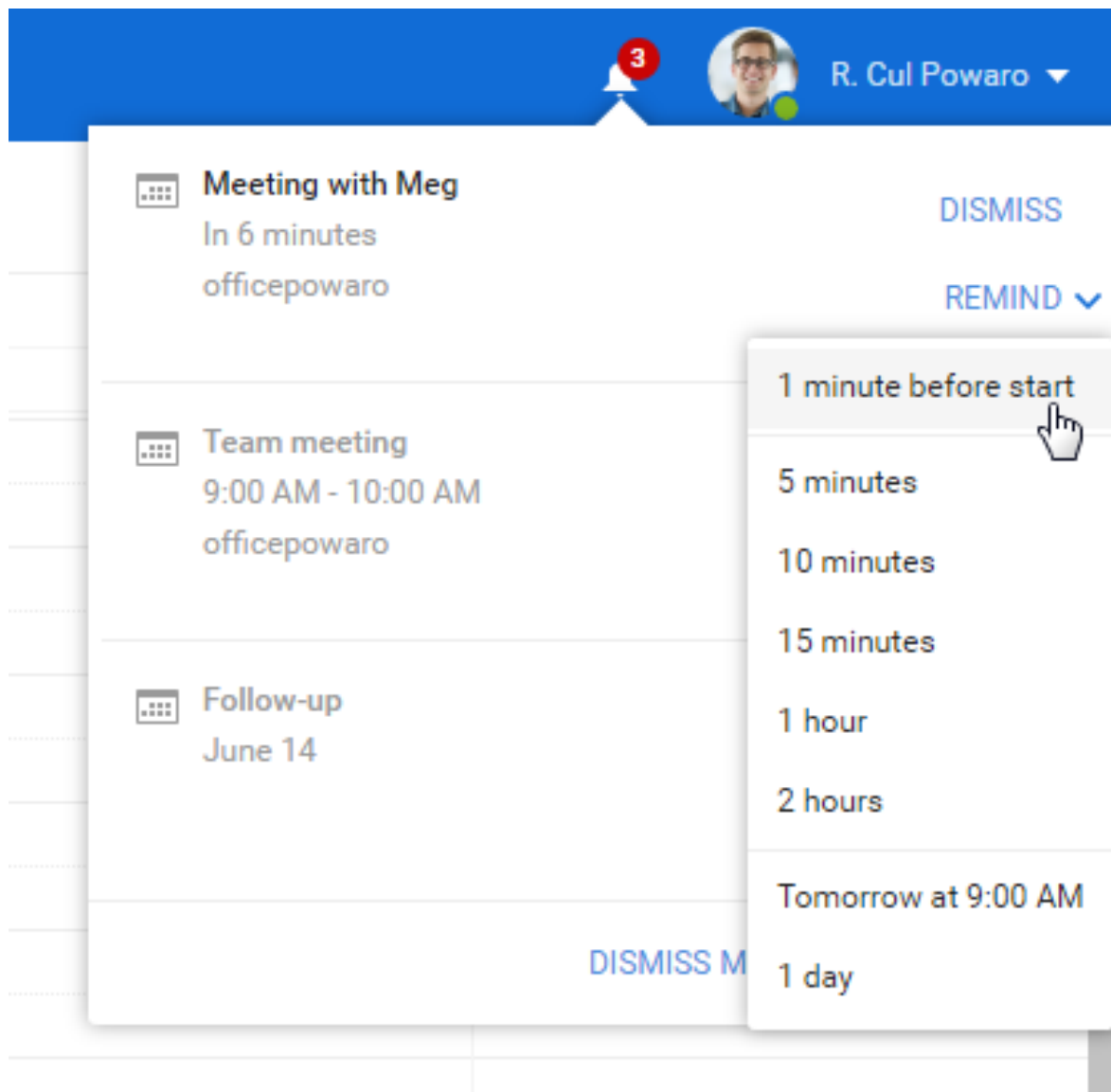


The icon in the top bar shows the number of events that:

- Have already started (grayed out)
- Are about to start

You can dismiss the reminders so that you no longer see them, or you can postpone them.

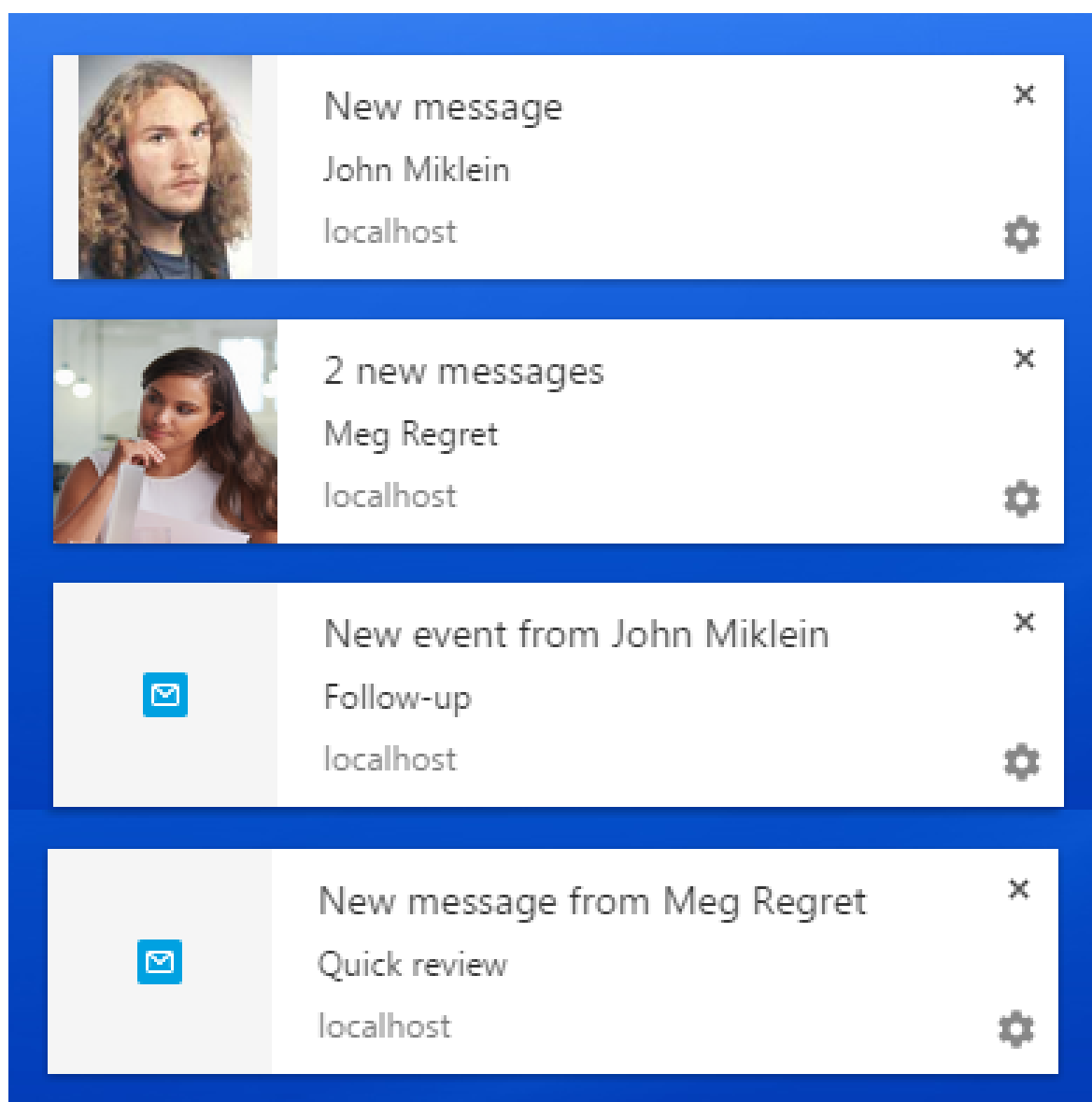
If you have more than one reminder, you can select **Dismiss All** or **Dismiss All Missed** events.



Desktop notifications (Chrome and Safari 6+)

Desktop notifications are small pop-up windows that appear on your screen if you are using one of these browsers:

- Chrome
- Safari 6 and later



To display desktop notifications:

1.
 - [Google Chrome](#)
 - [Safari](#)
2. Click your name in Kerio Connect Client and select **Settings**.
3. In the **Notifications** section (**Reminders** in earlier versions), select the types of notifications you want to receive — emails, chat messages, events and tasks.

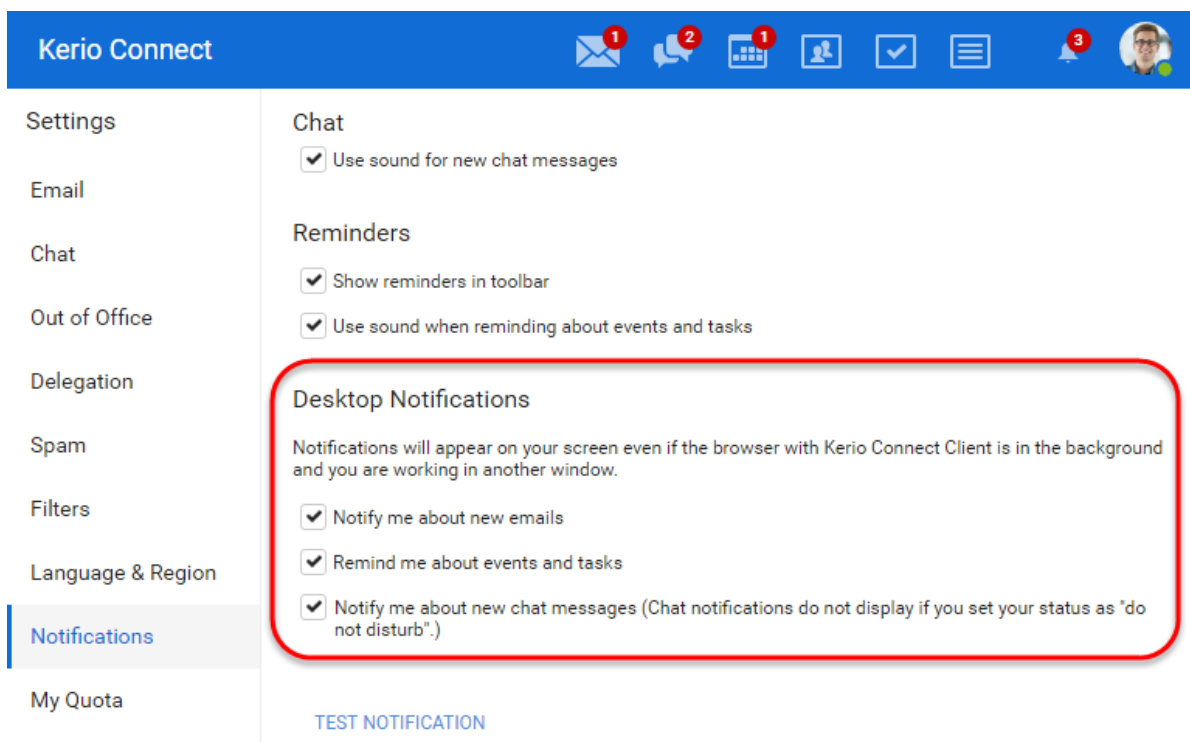
Enabling notifications in Kerio Connect Client



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

4. Click **Test Notification** to make sure notifications work.
5. Your settings are saved automatically.

When a notification appears on your screen, click it. The new message, event, or task displays in detail.



Pop-up notifications (Safari 5+, Firefox, IE)

Pop-up notifications are small pop-up windows (similar to desktop notifications above) that appear on your screen if you are using one of these browsers:

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

To display pop-up notifications:

1. If you are using a pop-up blocker in your browser, you must disable it or add an exception for your Kerio Connect address. These links describe the process for each browser:

- [Mozilla Firefox](#)
 - [Microsoft Internet Explorer](#)
 - [Safari](#)
2. Click your name in Kerio Connect Client and select **Settings**.
 3. In the **Notifications** section (**Reminders** in earlier versions), select the types of notifications you want to receive — emails, chat messages, events and tasks (see the image above).



These options are visible only if you disable the pop-up blocker.

4. Click **Test Notification** to make sure the notifications work.
5. Your settings are saved automatically.

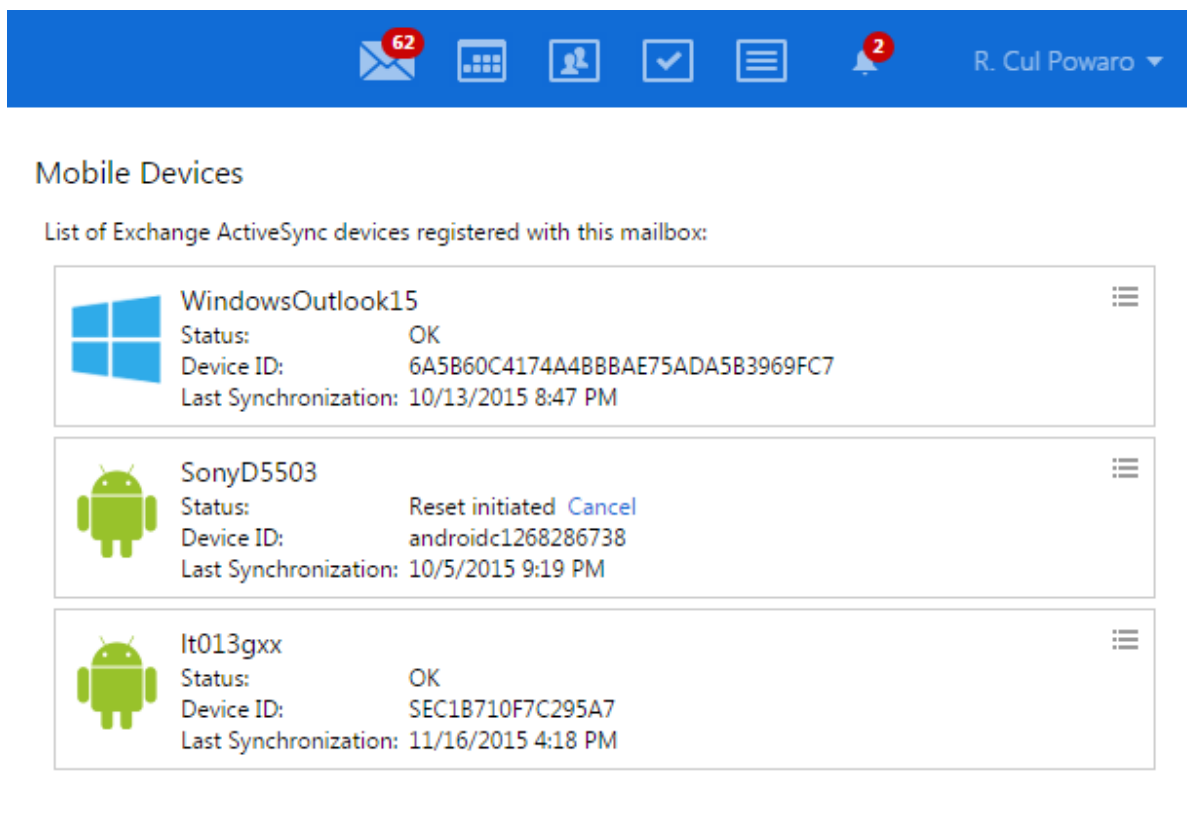
When a notification appears on your screen, click it and the new message, event, or task displays in detail.

Resetting your mobile device in Kerio Connect Client

Managing your devices

Kerio Connect Client shows all Exchange ActiveSync mobile devices (mobile phones, tablets) connected to your Kerio Connect account.

Click your name in the top right corner and select **Settings** → **Mobile Devices**.



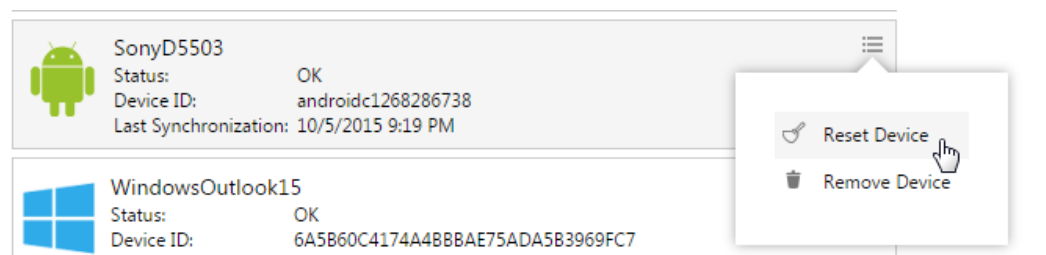
Resetting your devices

If you lose your device or the device is stolen, you can protect your personal data by deleting all the data from the device. This action is also called **remote wipe**.



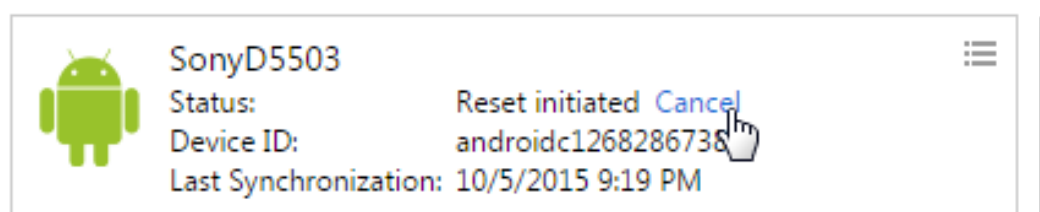
This action resets your device to factory settings. All data, including photos, videos, music, calendars, emails, will be deleted from your device. Some devices may also delete all data from memory cards.

1. In Kerio Connect Client, click your name in the top right corner and select **Settings**.
2. Go to the **Mobile devices** section.
3. In the list of mobile devices, find the device you want to reset and click **Reset Device**.

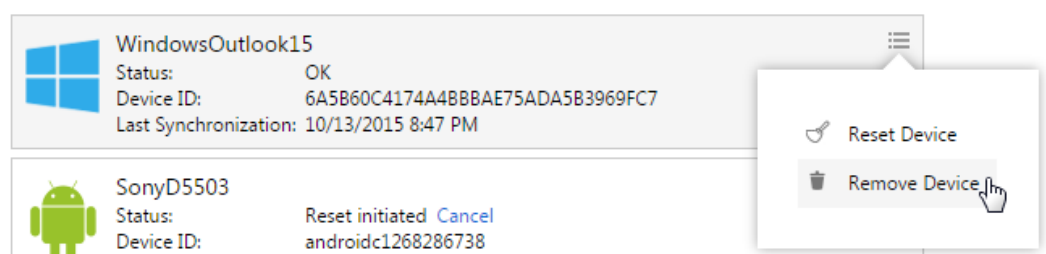


4. Type your Kerio Connect Client password to confirm the reset.
5. Once the device connects to the Kerio Connect server, all data will be removed from the device.

You can cancel the reset before the device connects to the Kerio Connect server (click **Cancel**).



6. When the reset is complete, select the device and click **Remove Device** to delete the device from the list.



Resetting your mobile device in Kerio Connect Client



If your device is lost or stolen, we recommend changing your Kerio Connect password after you reset your device.



If your iPhone is connected via IMAP, use the [Find my iPhone](#) feature to wipe your phone.

Support for encrypted and digitally signed messages in Kerio Connect Client

Details

In Kerio Connect Client, you can:

- [Sign your messages](#)
- [Encrypt your messages](#)
- [Display encrypted messages you receive](#)

Kerio Connect uses the [S/MIME standard](#) to sign and encrypt the messages.

Encrypting and signing messages

To sign and/or encrypt messages, you must:

1. [Initialize your certificate store](#)
2. [Acquire and import your personal certificate to your Kerio Connect Client](#)
3. [Sign](#) and/or [encrypt](#) messages you send (and display [decrypt] secured messages you receive).

Initializing certificate store in Kerio Connect Client

Overview

Before you can [digitally sign](#) and/or [encrypt messages](#), you must initialize your certificate store.

Initializing your certificate store

1. Log in to your Kerio Connect Client securely via HTTPS.
2. Click your name and select **Settings**.
3. Go to the **Secure Messages** section.
4. Create a password for the certificate store.

You can:

- Use your Kerio Connect Client password
- Create a unique password for the certificate store (this is the more secure option)

Initialize Certificates Store

To use encryption, you must initialize your certificate store and need a [certificate](#). Store has to be protected by password.

- ☐ Use the same password as for Kerio Connect Client
- ☒ Create unique Secure Messages password (more secure)

Create password

Password:

Confirm password:

INITIALIZE





Remember your password. Read the [Resetting your password](#) section for more information.

5. [Import your personal certificate](#).

When your store is initiated and your certificate imported, you can [digitally sign](#), and [encrypt and decrypt messages](#).

Changing your certificate store password

You can change the password to your certificate store anytime.

1. In Kerio Connect Client, click your name and select **Settings**.
2. Go to the **Secure Messages** section.
3. In **Certificate store protection**, you can:
 - Change the type of the password (same as for Kerio Connect Client or different)
 - Change the password

Certificate store protection

- ☐ Use the same password as for Kerio Connect Client
- ☒ Use different password (more secure)

To confirm this change, type:

Account password:

New password:

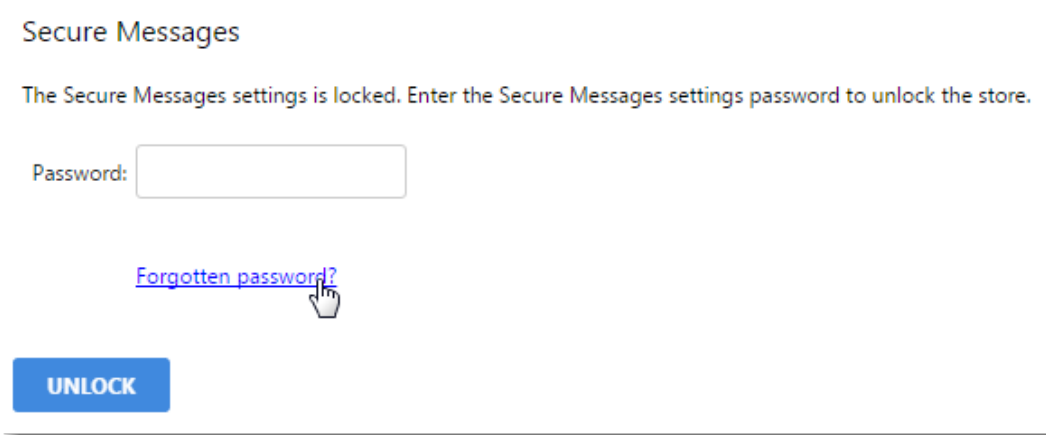
Confirm password:

SAVE

Resetting your certificate store password

If you forget the password to your certificate store (and you have a different password than for your Kerio Connect account), you must initialize the store again.

1. Login to Kerio Connect Client, click your name and select **Settings**.
2. Go to the **Secure Messages** section.
3. Click the **Forgotten password?** link.



Secure Messages

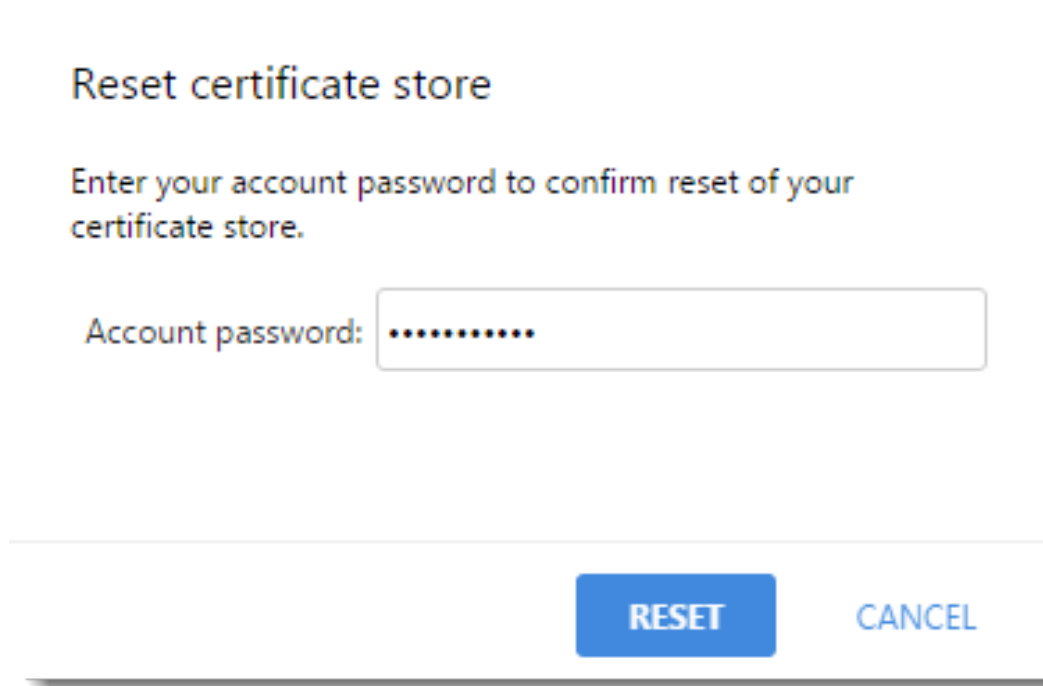
The Secure Messages settings is locked. Enter the Secure Messages settings password to unlock the store.

Password:

[Forgotten password?](#)

UNLOCK

4. Click **Continue** to confirm the reset action.
5. Type your Kerio Connect Client password and click **Reset**.



Reset certificate store

Enter your account password to confirm reset of your certificate store.

Account password:

RESET **CANCEL**

Now you must [initialize your certificate store](#) again and [import all your certificates](#) to start sending encrypted and digitally signed messages.

Importing personal certificates to Kerio Connect Client

About personal certificates

If you want to send encrypted or digitally signed messages, you must import a personal certificate into Kerio Connect Client.

You can acquire a personal certificate in one of two ways:

- Ask your administrator to get you one,
- Download your own certificate for free from a site such as [Comodo](#) or [Instant SSL](#)

You must have a separate personal certificate for each of your email addresses, including any aliases.

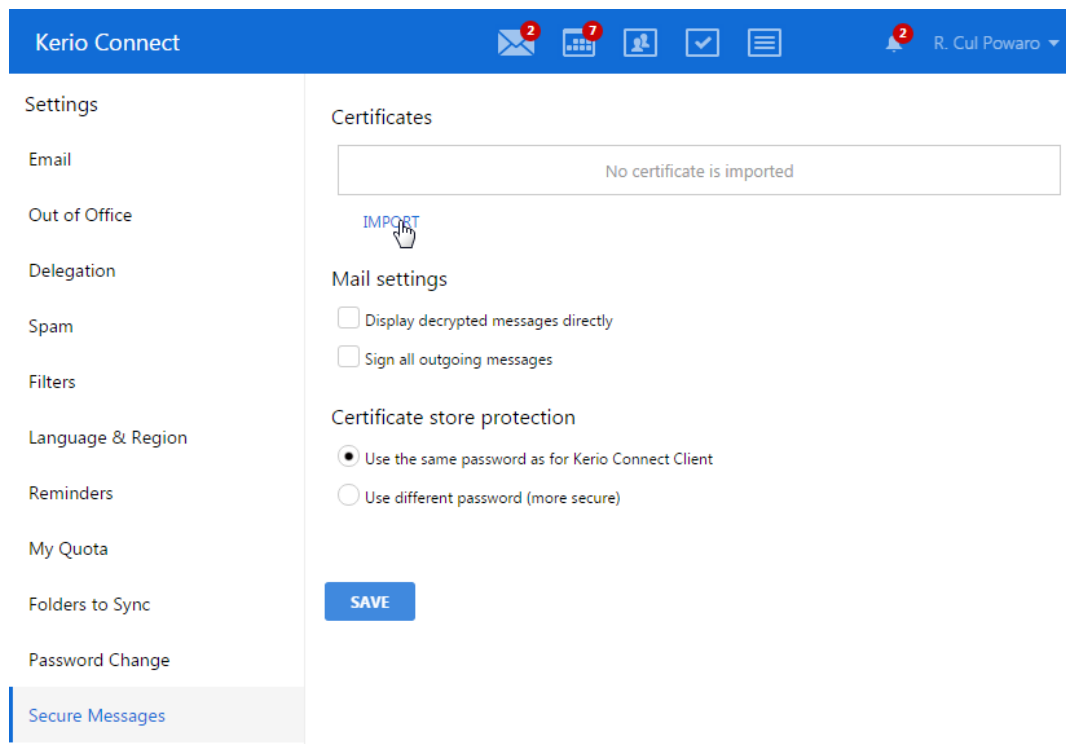


Back up your certificates so you can use them when [re-initializing](#) your certificate store.

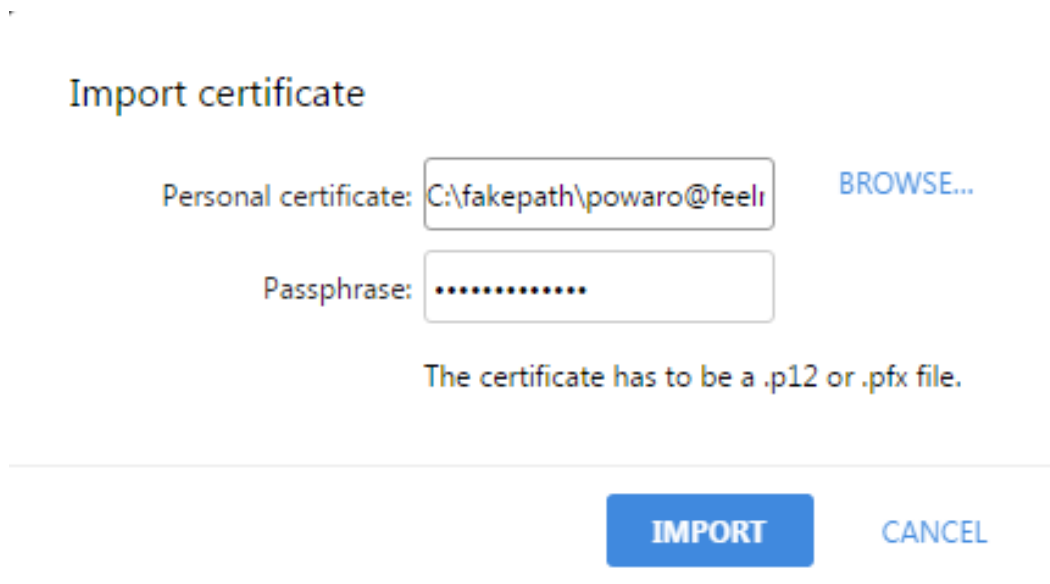
Importing personal certificates into Kerio Connect Client

1. Login to Kerio Connect Client securely, click your name and select **Settings**.
2. Go to the **Secure Messages** section.
3. Login to your certificate store.
4. In the **Secure Messages** section, click **Import**.

14.2 Importing personal certificates into Kerio Connect Client



5. Browse to find the certificate file, type the passphrase and click **Import**.



Importing personal certificates to Kerio Connect Client

The server verifies the validity of the certificate. If the certificate is not valid, ask your administrator to upload a [root certificate](#) to the server.

6. Repeat steps 1-5 for all your certificates.

Certificates



R. Cul Powaro <powaro@feelmorlaw.com>

Issued by: Kerio Technologies Inc.

Valid to: 8/13/2030

 The certificate is valid.



IMPORT

Displaying certificate details

To display details about your certificate, such as the serial number and validity status, click the certificate menu and select **Details**.

Certificates



R. Cul Powaro <powaro@feelmorlaw.com>

Issued by: Kerio Technologies Inc.

Valid to: 8/13/2030

 The certificate is valid.



 Details

 Download

 Delete

IMPORT

**R. Cul Powaro**

Issued by: Kerio Technologies Inc.



The certificate is valid.

Issued for powaro@feelmorrelaw.com

Valid from 8/13/2015

Valid to 8/13/2030

Serial number 10 06 de

Downloading your certificate

To download your certificate, click the certificate menu and select **Download**.

Certificates



R. Cul Powaro <powaro@feelmorrelaw.com>

Issued by: Kerio Technologies Inc.

Valid to: 8/13/2030



The certificate is valid.

IMPORT

 Details

Download

Delete

Importing personal certificates to Kerio Connect Client

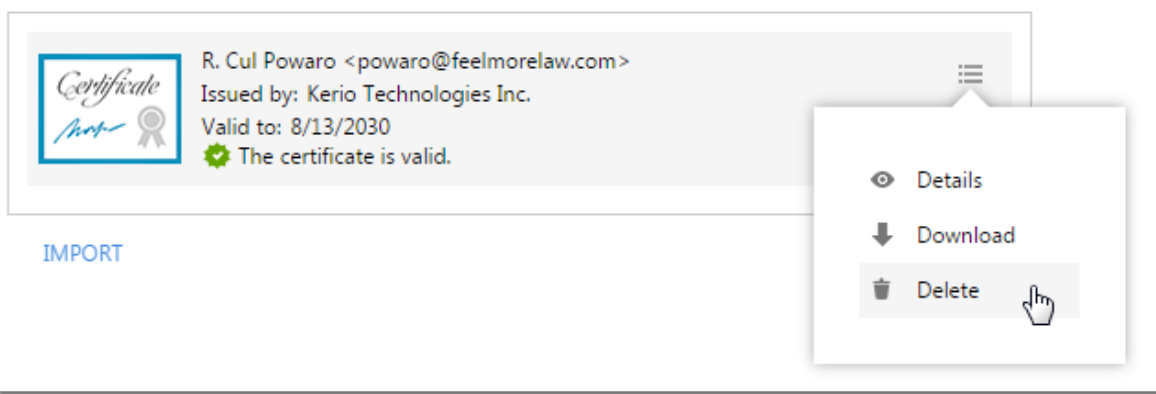


Download and back up your certificates so you can use them when [re-initializing](#) your certificate store.

Deleting your certificate

To delete your certificate, click the certificate menu and select **Delete**.

Certificates



Digitally signing messages in Kerio Connect Client

Overview

If you add your digital signature to your messages, the recipients know that you personally have sent the message and the message has not been changed during the delivery.

Prerequisites

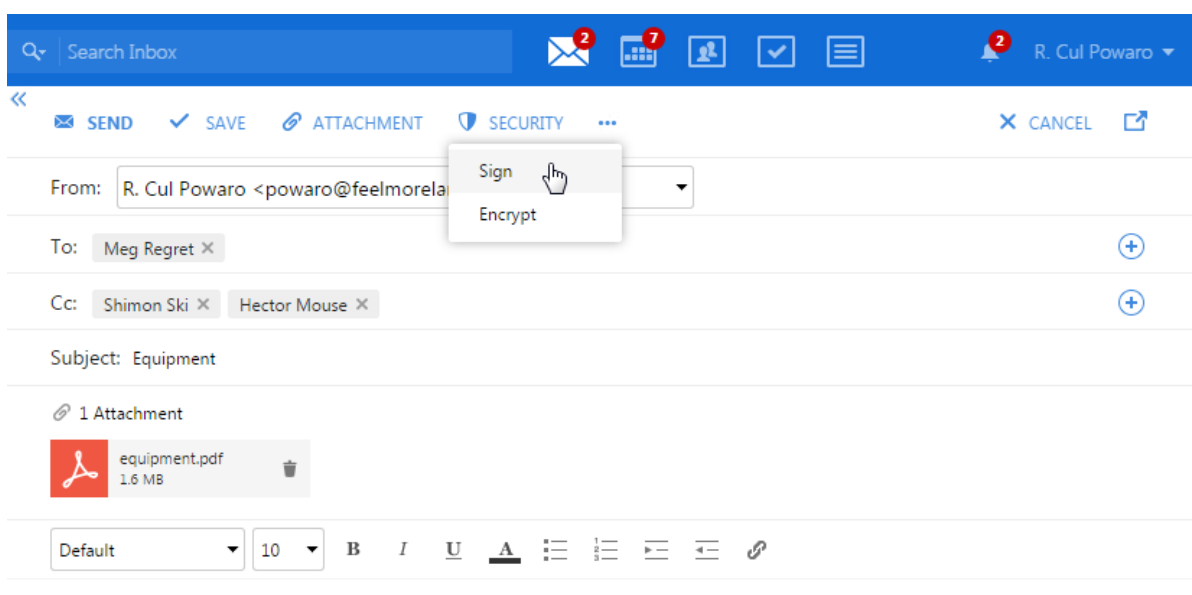
Before you can sign your messages digitally, you must:

- [Initialize your certificate](#)
- [Import a valid personal certificate](#)

Digitally signing messages

To digitally sign your messages:

1. Log in to your Kerio Connect Client securely via HTTPS.
2. [Compose a message](#).
3. Click the **Sign the message** button.
You must enter the password for your [certificate store](#).
4. Send the message.



Signing all messages automatically

Kerio Connect Client can sign all your outgoing messages automatically.

1. Log in to your Kerio Connect Client securely via HTTPS.
2. Click your name and select **Settings**.
3. Go to the **Secure Messages** section.
4. In the **Mail settings**, select the **Sign all outgoing messages** option.
5. **Save** your settings.

Certificates



R. Cul Powaro <powaro@feelmorrelaw.com>
Issued by: Feel Moe eLaw Inc.
Valid to: 8/13/2030
 The certificate is not trusted.



IMPORT

Mail settings

☒ Display decrypted messages directly
☒ Sign all outgoing messages

Certificate store protection

☐ Use the same password as for Kerio Connect Client
☒ Use different password (more secure)

[Change password](#)

SAVE

Encrypting messages in Kerio Connect Client

Overview

If you encrypt your messages, only message recipients can read your messages.

Prerequisites

To encrypt messages, you must first:

- [Initialize your certificate store](#)
- [Import a personal certificate](#)
- Have the recipients's public certificate

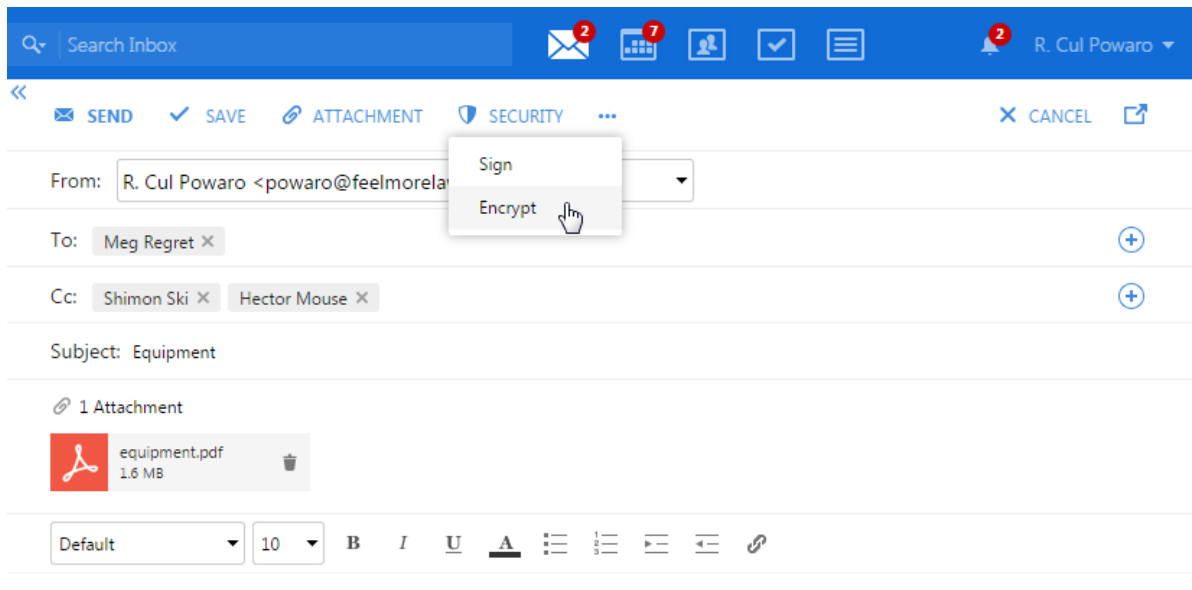


To acquire another user's public certificate, ask them to send you a digitally signed message, and then reply to that message.

Encrypting messages

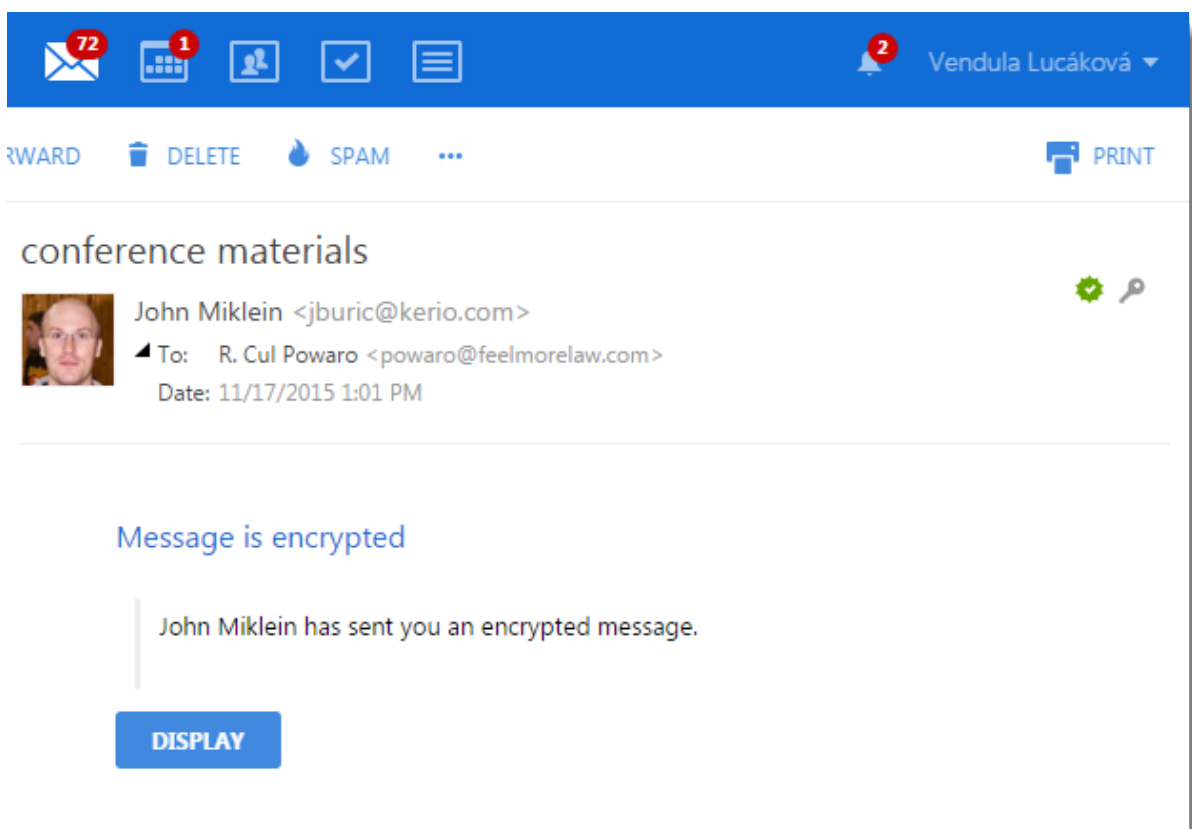
To encrypt messages:

1. [Compose a message](#).
2. Click the **Encrypt the message** icon.
If your certificate store is locked, enter your [certificate store password](#).
3. Send the message.



Reading encrypted messages

To read an encrypted message, click the **Display** button.



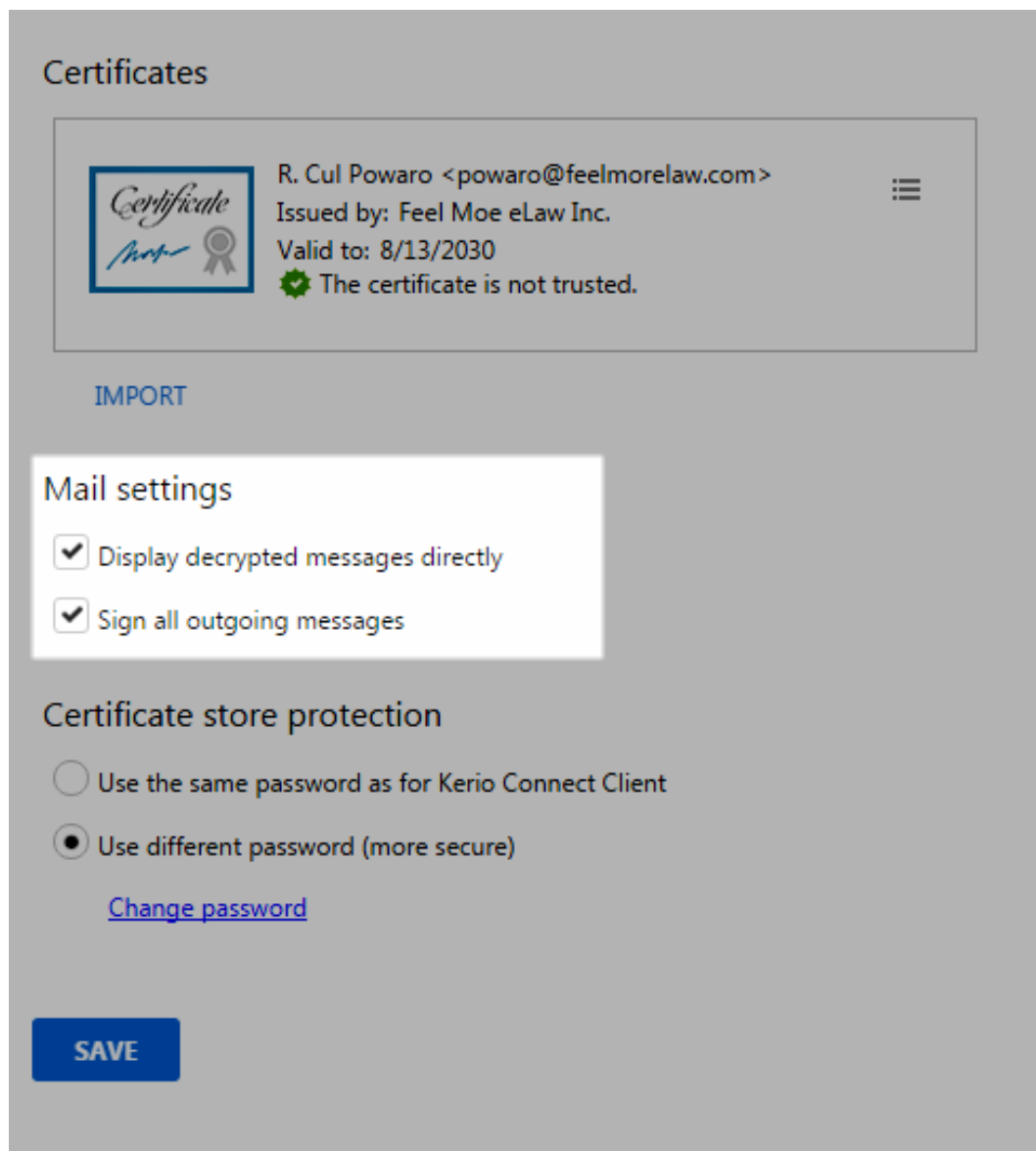
Encrypting messages in Kerio Connect Client

If your certificate store is locked, enter your [certificate store password](#) first.

Displaying encrypted messages directly

If you do not want to click the **Display** button in every encrypted message you receive, Kerio Connect Client can decrypt those messages automatically.

1. Login to Kerio Connect Client securely, click your name and select **Settings**.
2. Go to the **Secure Messages** section.
3. Login to your certificate store.
4. In the **Secure Messages** section, select the **Display decrypted messages directly** option.



From now on, Kerio Connect Client displays all your messages directly.

Sending chat messages in Kerio Connect Client

Overview



New in Kerio Connect 9.1!

Kerio Connect Client includes a **Chat** feature for exchanging instant messages. Chat enables you to view your colleagues' [online status](#), and to chat with them in real-time. This is useful in case you cannot wait for an email response, and you prefer to have an immediate conversation without the use of a phone.

Kerio Connect Client stores all the chat messages sent and received through Kerio Connect Client.



If you use the Safari browser, verify you have a valid SSL certificate. For details, see [Making SSL certificates trusted in Safari](#).

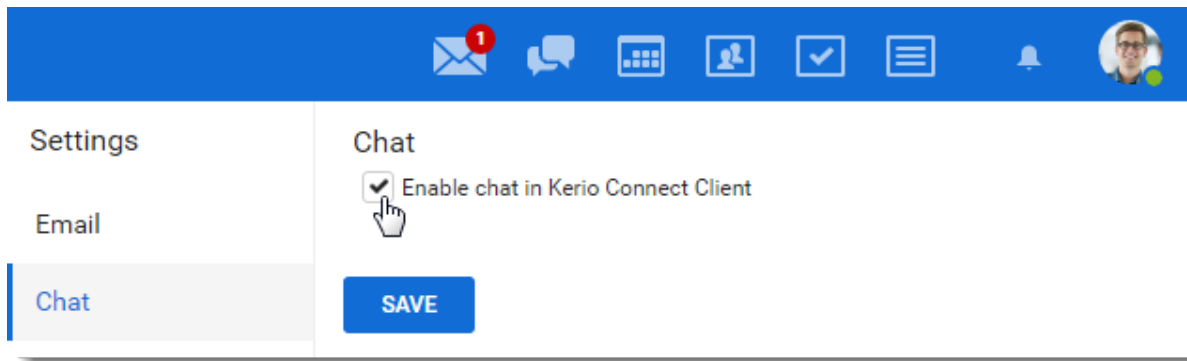
You can also receive instant messages using an [XMPP/Jabber application](#).

Enabling or disabling chat in Kerio Connect Client

To use chat in your Kerio Connect Client, your administrator must [enable chat for your domain](#).

If you don't see **Chat** in Kerio Connect Client even if it is allowed for your domain, enable it in your Kerio Connect Client settings:

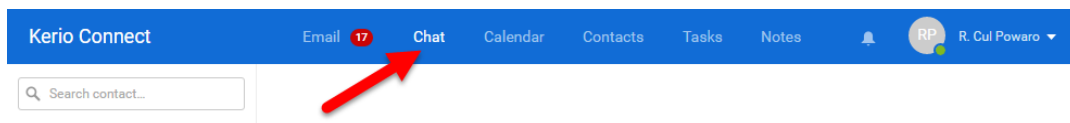
1. Click your name in Kerio Connect Client.
2. Click **Settings**.
3. In the **Chat** section, select **Enable chat in Kerio Connect Client**.
4. Click **Save**.



To disable chat, unselect the option.

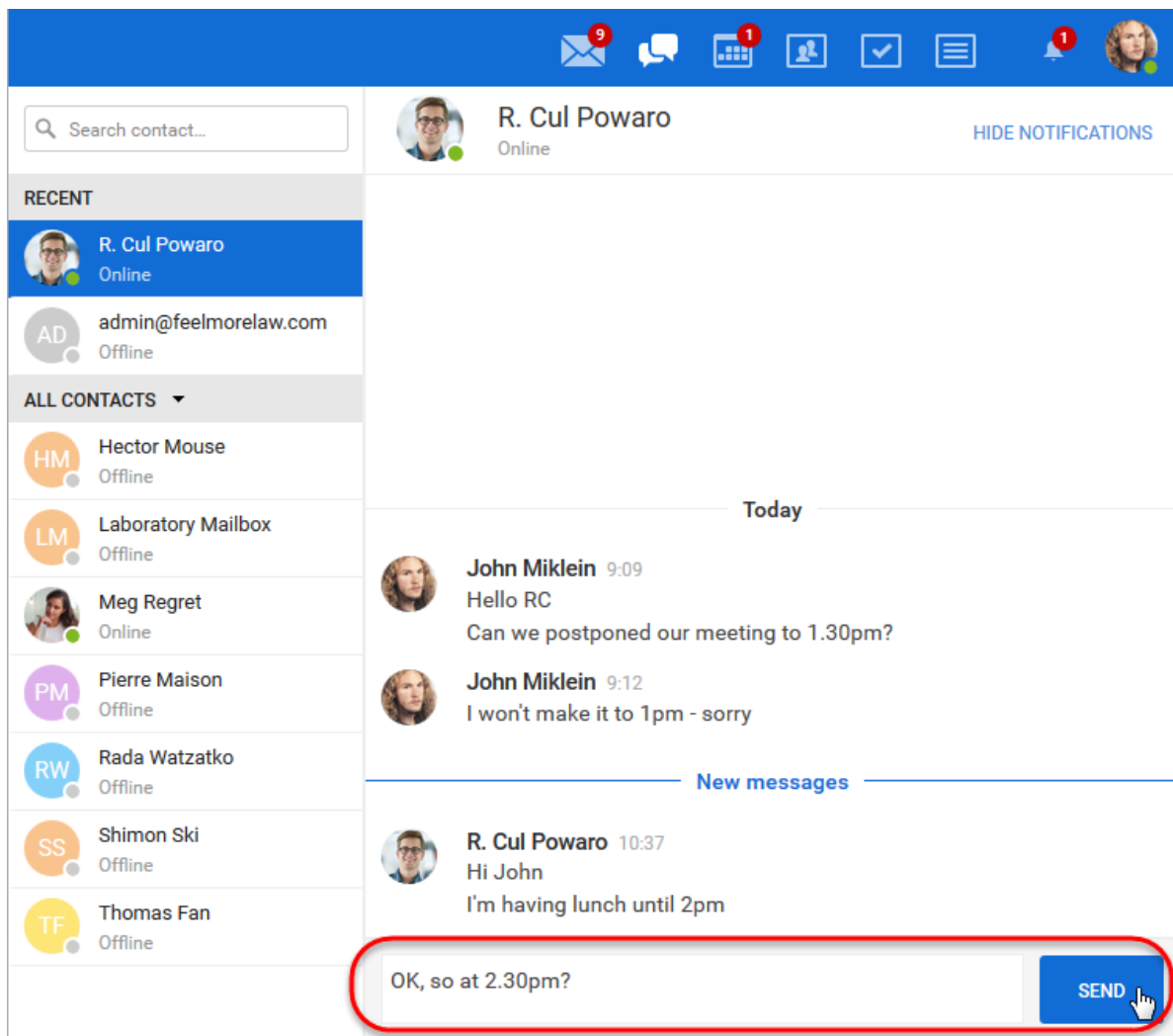
Sending instant messages

1. Log in to [Kerio Connect Client](#).
2. Switch to **Chat**.



3. In the left side contact list, select a person you want to chat with.
4. Type your message.
5. Click **Send**.

Sending chat messages in Kerio Connect Client



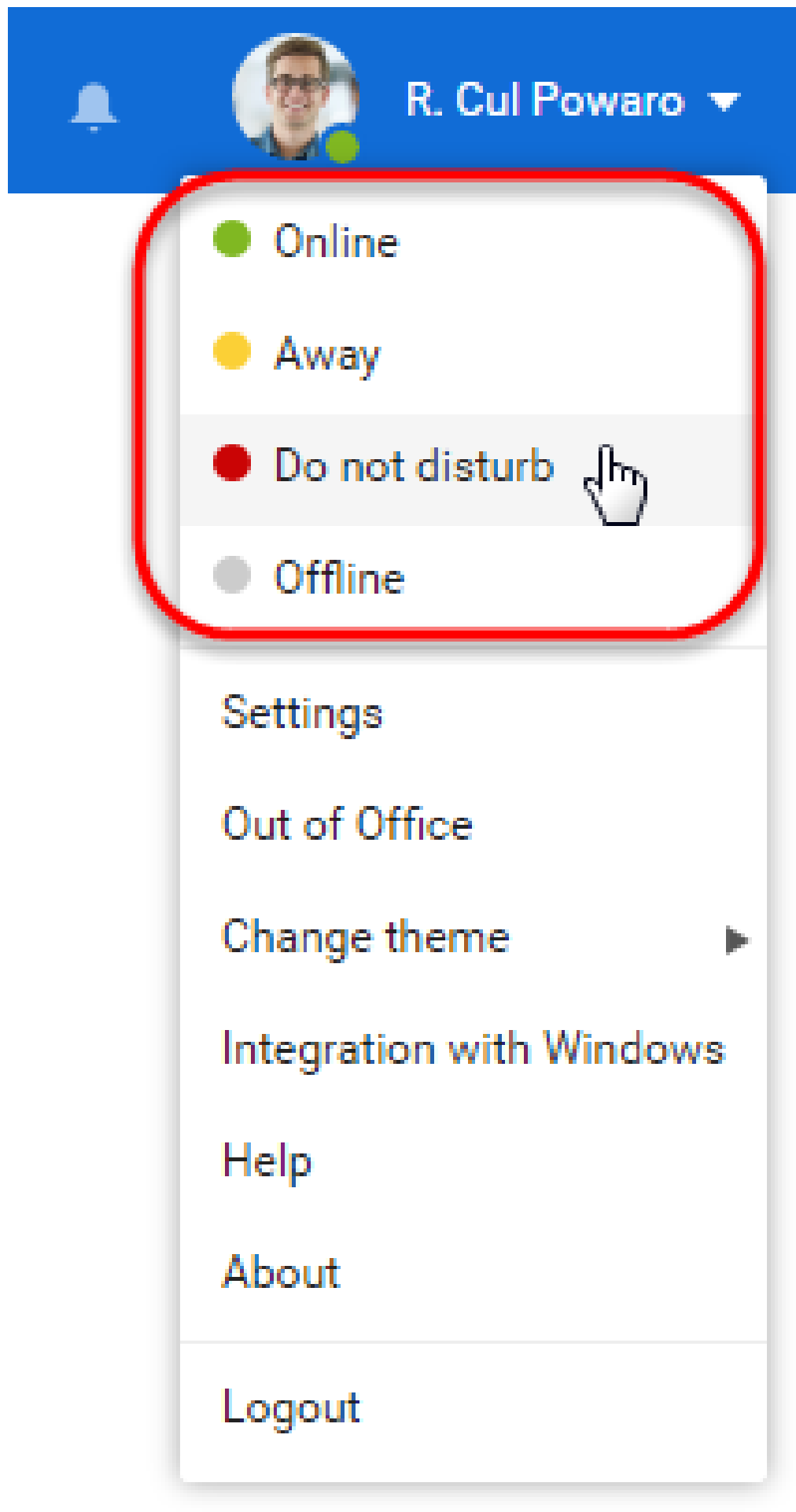
Setting your status

You can let other users know whether you are free for chat or unavailable.

You can set your status to: **Online**, **Away**, **Do not disturb**, and **Offline**. Each status is represented by a colored dot.

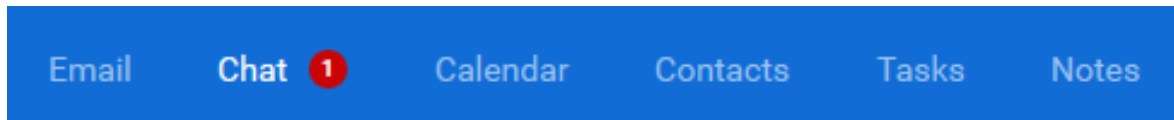
When you log in to Kerio Connect Client, your status is set automatically to **Online**. To change your status:

1. In Kerio Connect Client, click your name or your photo in the top right corner.
2. Select your status.



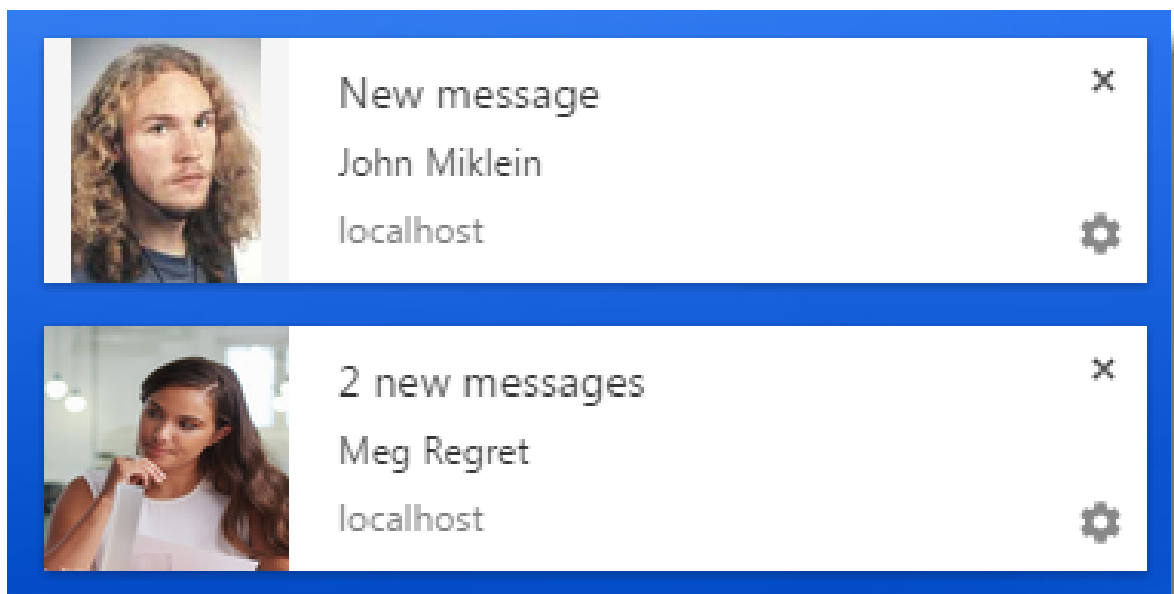
Receiving instant messages - notifications

When you receive a chat message, Kerio Connect Client displays a number in the top bar.



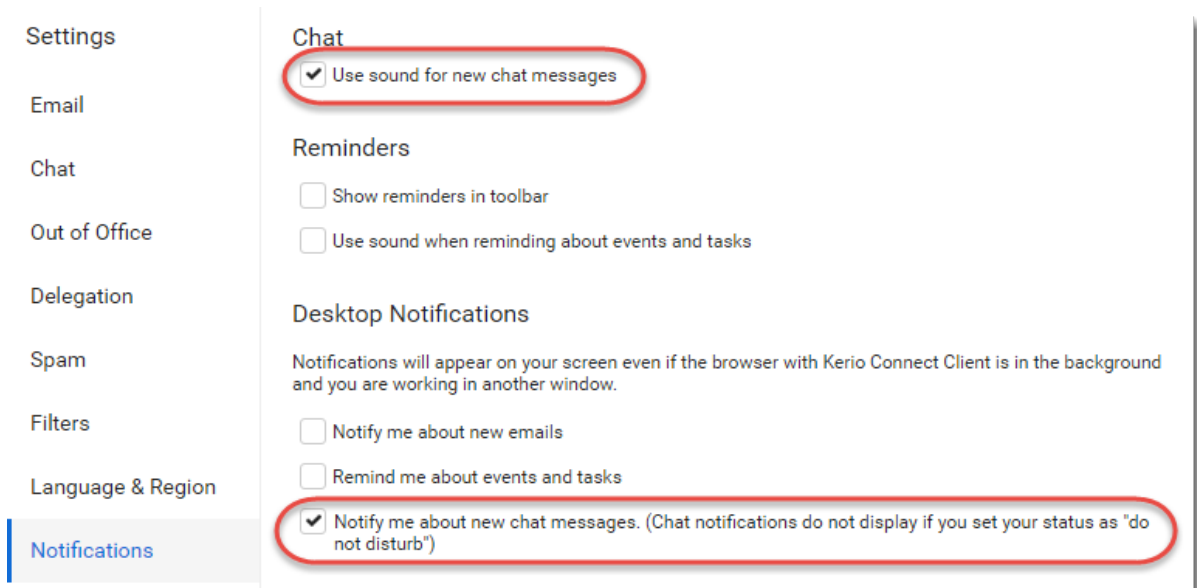
Desktop notifications

Desktop notifications are small pop-up windows that appear on your screen when you receive a chat message.



To enable desktop notifications:

1. In Kerio Connect Client, click your name and select **Settings**.
2. Switch to the **Notifications** section.
3. Select **Notify me about new chat messages**.
4. To receive sound notifications, select **Use sound for new chat messages**.
5. Kerio Connect Client saves the settings automatically.



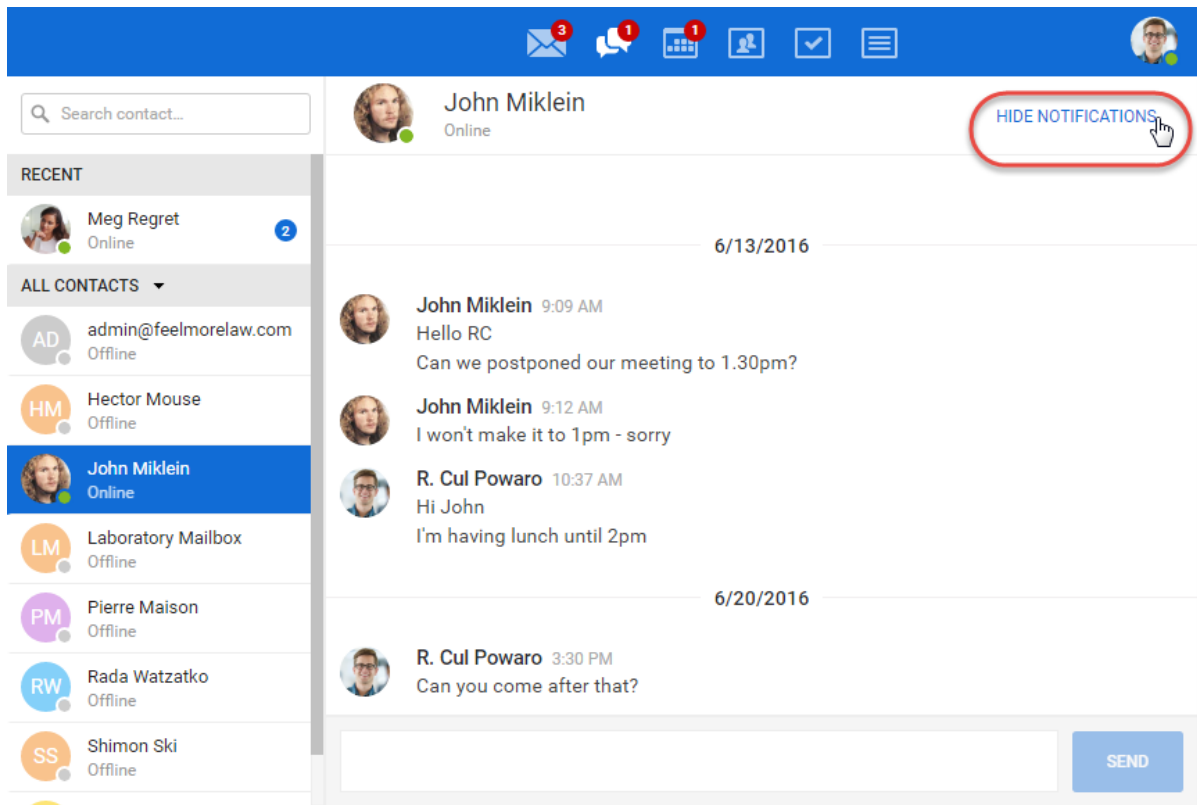
If you set your status to **Do not disturb**, Kerio Connect Client does not display any notifications for new chat messages.

Disabling notifications for individual contacts

To temporarily disable notifications for any of your contacts:

1. In Kerio Connect Client, switch to the **Chat** section.
2. Select the contact in the list of contacts on the left.
3. In the chat window, click **Hide notifications** in the upper right corner.

Sending chat messages in Kerio Connect Client



The contact now shows a mute icon



To enable notifications again, click **Show notifications** in the upper right corner.

Making SSL certificates trusted in Safari

Overview

Kerio Connect Client on Safari requires a trusted SSL certificate to use the **Chat** and **Presence** features. If your server does not use an SSL certificate signed by a trusted Certificate Authority, you can trust the certificate by importing it into your system.



Certificate error

Safari cannot use chat and presence status without a trusted certificate.

[Learn more...](#)

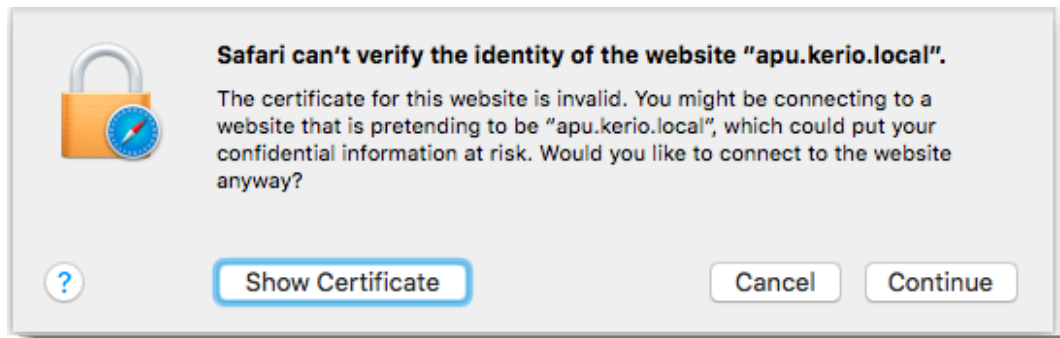
Making SSL certificates trusted in Safari

To import a certificate to your system:

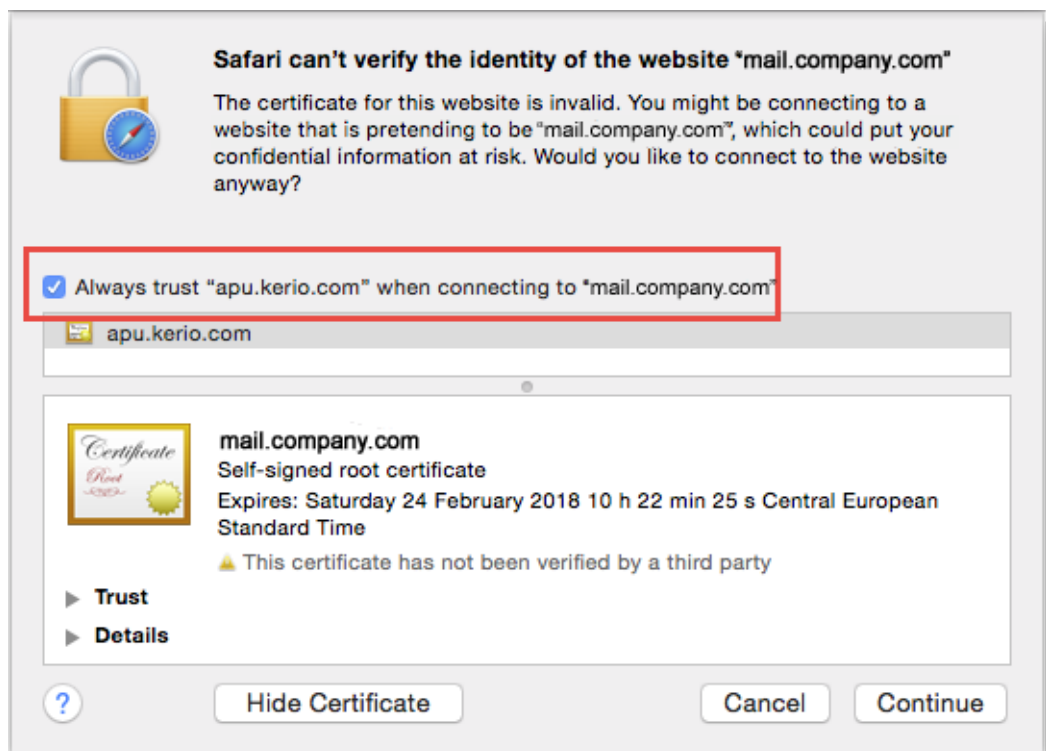
1. Open Safari.
2. [Log into Kerio Connect Client.](#)

During the login the **Safari can't verify the identity of the website mail.company.com** dialog box opens.

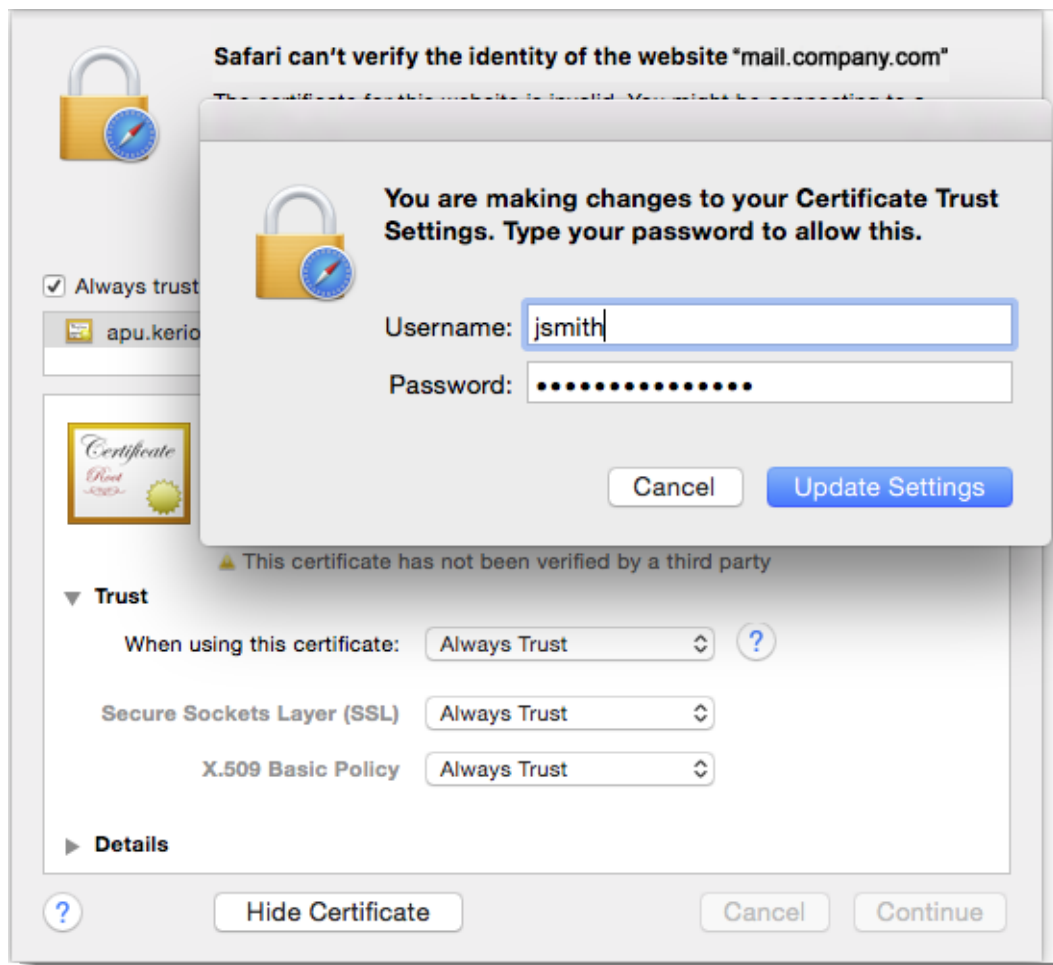
Making SSL certificates trusted in Safari



3. Click **Show Certificate**.
4. Select **Always trust mail.company.com when connecting to mail.company.com**.



5. Click **Continue**.
A verification dialog box opens.
6. To confirm the SSL certificate as always trusted, type a password of the user with administration rights to the system.



7. Click **Update Settings**.

The Kerio Connect Client login dialog opens.

Log into Kerio Connect Client and verify that **Chat** works properly.



Your messenger is set up
Select a contact and enjoy the conversation!

Using contacts in Kerio Connect Client

Creating contacts

In Kerio Connect Client you can create contacts:

- [In the Contacts section](#)
- [From any email message](#)

Creating contacts in the Contacts section

1. In Kerio Connect Client, go to the **Contacts** section.
2. Click **New contact**.
3. Type the contact information.
4. Click **Add field** to add additional information.

To add items of already displayed information, click the **plus** sign at the right of an item.

The screenshot shows a contact form with the following fields: Work email (kohl@kohlombo.com), Mobile (+123456789), and Work web (www.kohlombo.com). A dropdown menu is open on the left, showing options: Job title, IM address, Nickname, Birthday/Anniversary, Department/Office, and Manager/Assistant. A plus sign is visible next to the Work email field, and a dropdown menu is open on the right, showing options: Work email, Home email, and Other email.

5. Click **Upload photo** and select the contact photo.



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

6. Click **Save**.

Using contacts in Kerio Connect Client

The screenshot shows the 'Edit Contact' form in the Kerio Connect Client. At the top, there is a blue header bar with a search bar labeled 'Search All contacts', several icons (mail, calendar, people, checkmark, menu), and a user profile 'R. Cul Powaro'. Below the header, there are 'SAVE' and 'CANCEL' buttons. The contact information is displayed in a form with the following fields:

- First name:** Kohl
- Last name:** O'Mbo
- Middle name:** (empty)
- Company:** Kohl O'Mbo Investigations
- Job title:** Private Investigator
- Work email:** kohl@kohlombo.com
- Mobile:** +123456789
- Work web:** www.kohlombo.com
- Work address:** Dimebare Street 1234
- City:** Bludchil City
- State:** (empty)
- Zip:** 12345
- Country:** (empty)
- Notes:** Fill your notes
- Nickname:** Raincoat
- Manager:** Manager
- Assistant:** Thomas Fan

At the bottom, there is a '+ ADD FIELD' button.



If you synchronize your Kerio Connect account with an Exchange ActiveSync device, the following applies due to the limitation of the Exchange ActiveSync protocol:

- Only the first three email addresses synchronize.
- The types of email addresses don't synchronize (for example, work email, or home email).

Creating contacts from email messages

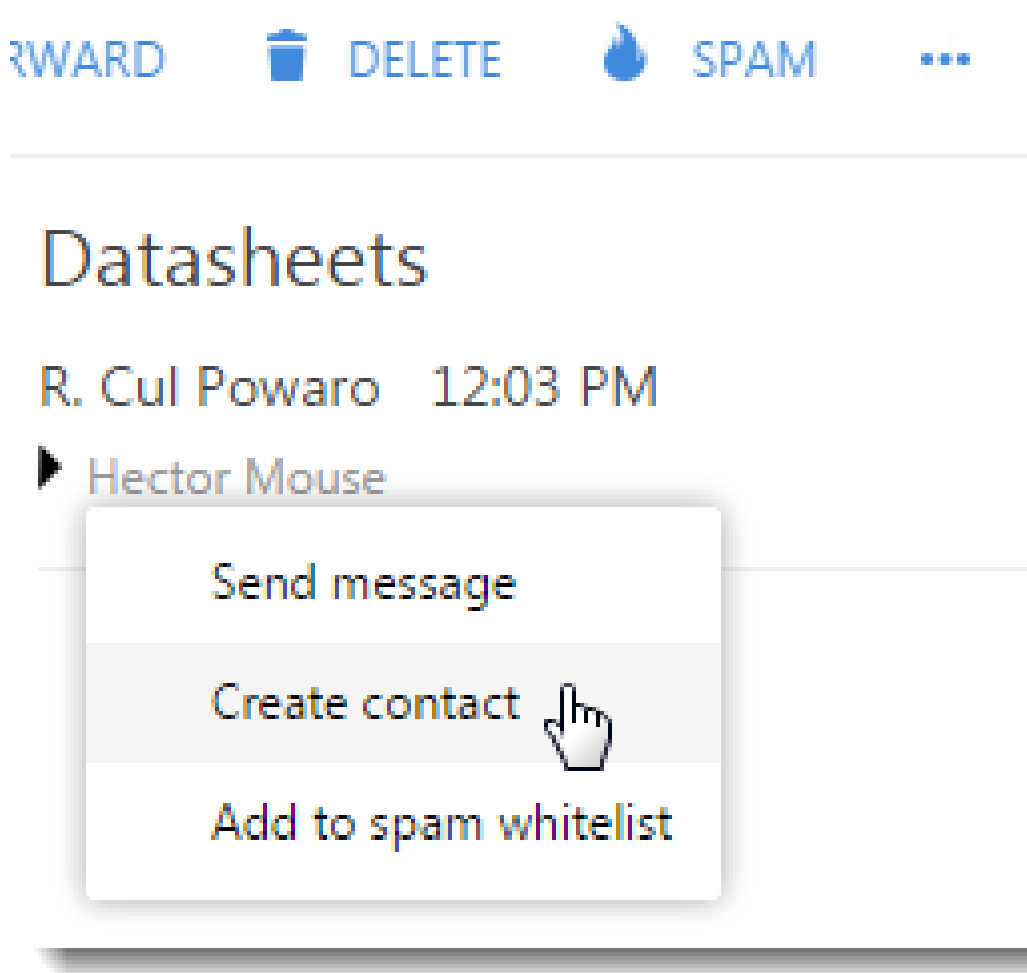


New in Kerio Connect 8.5!

You can create or update contacts directly from the messages you receive.

1. Select a message in Kerio Connect Client.

2. Click any name or email address in the message header.
3. Click **Create contact**.



If the contact already exists, the option reads **Update contact** and opens the contact edit window.

Auto-created contacts

If you send messages to addresses that are not in your contacts, Kerio Connect Client saves the addresses.

These addresses are not visible in your contact folders. However, when you compose a message, Kerio Connect Client offers you these addresses together with other addresses from your contact list.

You can find additional info in [Sending messages in Kerio Connect Client](#)



Kerio Connect does the same when you receive a message from addresses that are not in your contacts.

Creating contact groups

Contact groups, also known as distribution lists, are groups of email addresses used for sending messages to multiple users.

1. In Kerio Connect Client, go to the **Contacts** section.
2. Click **New group**.
3. Type a name for the group.
4. In the **Contacts** field, type an email address and hit **Enter**.
As you type, Kerio Connect suggest users from your contact folders.
You can add a single email address or a contact group.
5. Add as many email addresses as you want.
6. Click **Save**.

✓ SAVE ✕ CANCEL

Group name: Media

Contacts: r

R. Cul Powaro	powaro@feelmorlaw.com
R. Cul Powaro	rcp@feelmorlaw.com
Meg Regret	regret@feelmorlaw.com
Rada Watzatko	watzatko@feelmorlaw.com



Apple OS X does not support distribution lists — contact groups are not synchronized to Address Book and vice versa.

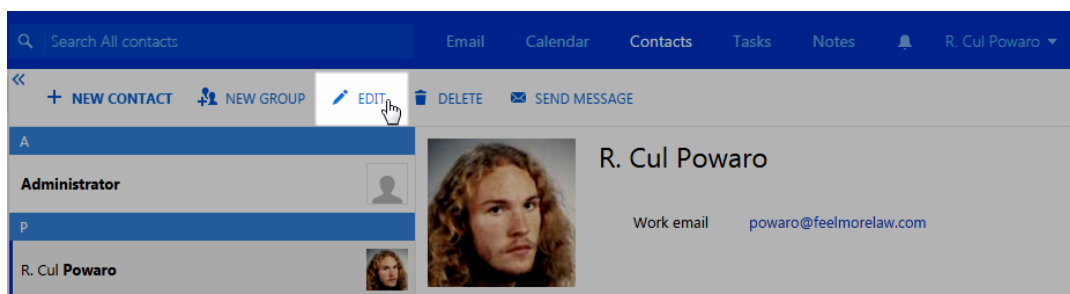
Editing contacts

You can edit:

- Contacts you created in Kerio Connect Client
- Public contacts if you have [appropriate rights](#)
- Contacts shared with you if you have [appropriate rights](#)

1. Go to the **Contacts** section.
2. Select the contact or group.
3. Click **Edit**.

You can also double-click the contact in the list.



4. Update the information.
5. Click **Save**.

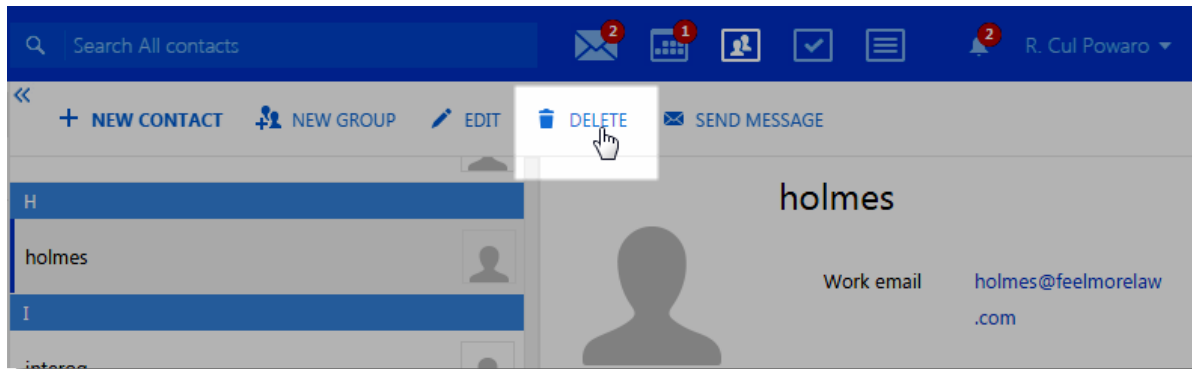


New in Kerio Connect 8.5!

You can also click the name or email address in any message and update the contact (see [Creating contacts from email messages](#)).

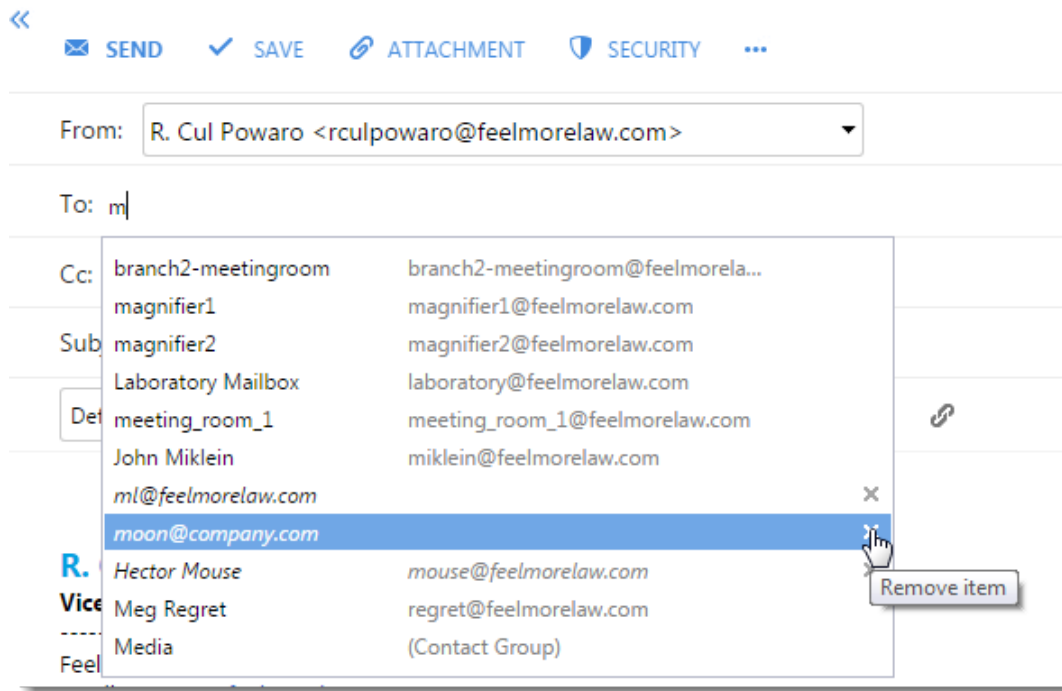
Deleting contacts

1. Go to the **Contacts** section.
2. Select the contact or group.
3. Click **Delete**.



To delete the [auto-created contacts](#), you can also:

1. Go to the **Email** section.
2. Click **Compose**.
3. Type the email address you want to delete.
4. In the list of offered email addresses, click the delete icon next the contact you want to delete.



To delete [contacts shared with you](#), you must have appropriate rights.

Sorting contacts

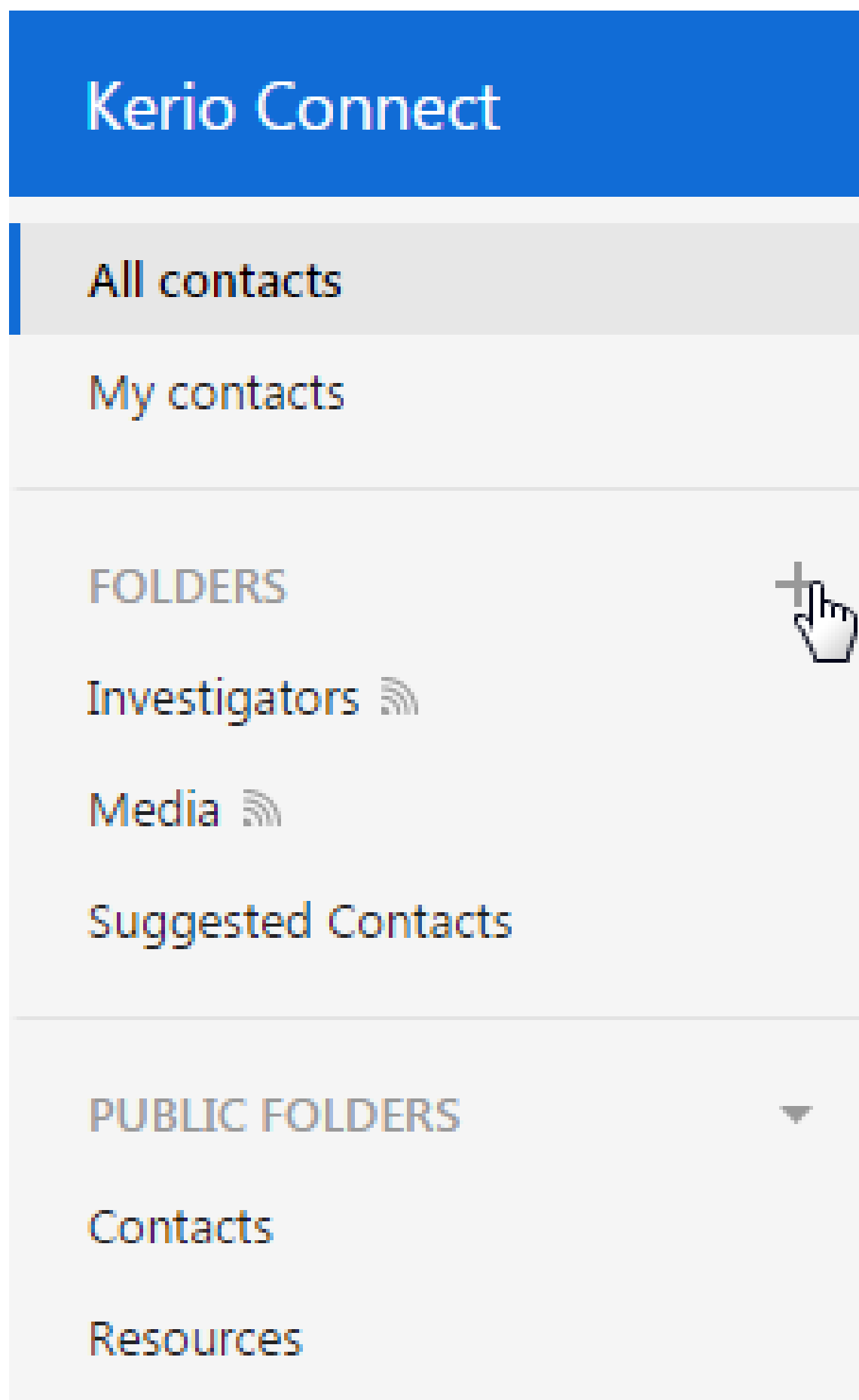
In Kerio Connect Client, contacts are sorted according to contact's **Last name**.

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 the contact from its original folder to another in the navigation tree on the left.

Sharing your contact folders

To share your contact folders and display contacts others share with you, read [Sharing in Kerio Connect](#).

Using tasks in Kerio Connect Client

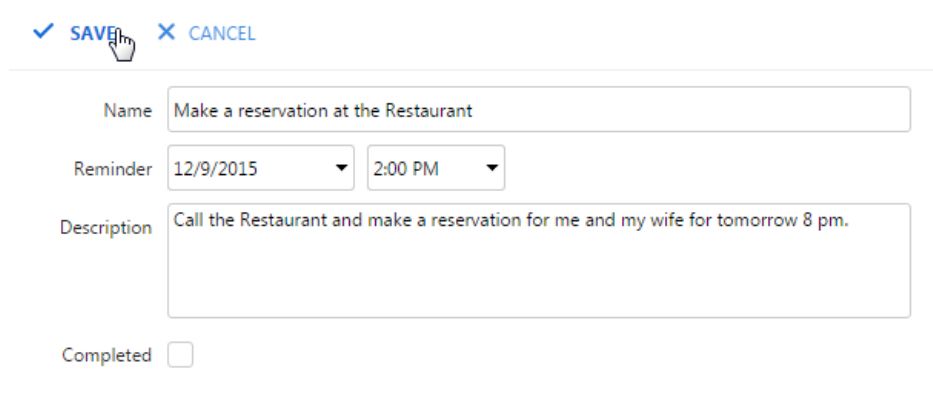
Creating tasks

To create a new task:

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

Double-click the task to:

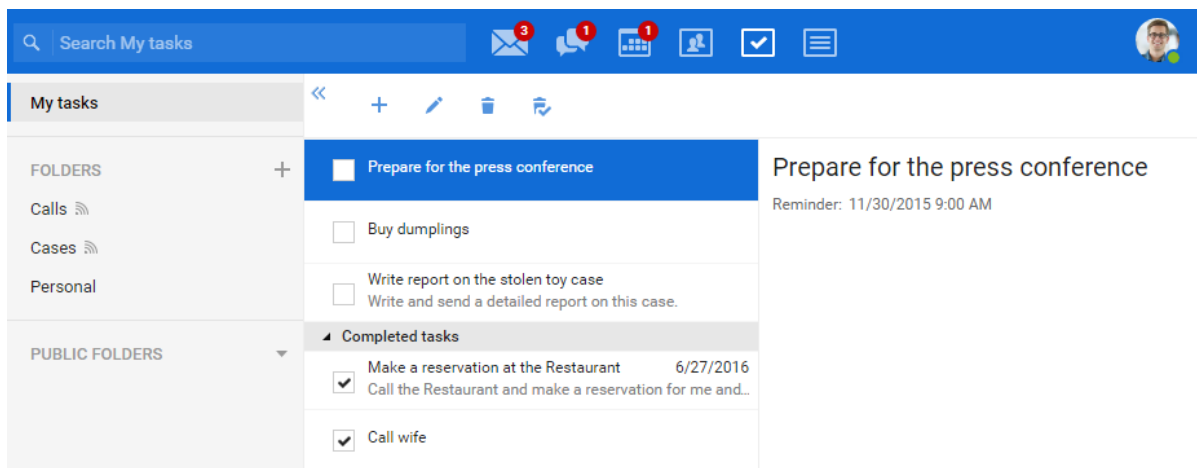
- Add a reminder date and time (to learn about reminders, read [Enabling notifications in Kerio Connect](#))
- Add notes about the task



The screenshot shows a dialog box for creating a new task. At the top, there are two buttons: a blue 'SAVE' button with a checkmark icon and a grey 'CANCEL' button with an 'X' icon. Below these buttons, the form has the following fields:

- Name:** A text input field containing 'Make a reservation at the Restaurant'.
- Reminder:** Two dropdown menus. The first shows '12/9/2015' and the second shows '2:00 PM'.
- Description:** A text area containing 'Call the Restaurant and make a reservation for me and my wife for tomorrow 8 pm.'
- Completed:** A checkbox that is currently unchecked.

When you are done, save the task.



Working with tasks

In the Tasks section, you can:

- [Sort your tasks into folders](#)
- Mark tasks as complete using the check box on their left

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

To remove a task, right-click it 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 a task to a different folder, drag it from its original folder to another in the tree on the left.

Sharing your task folders

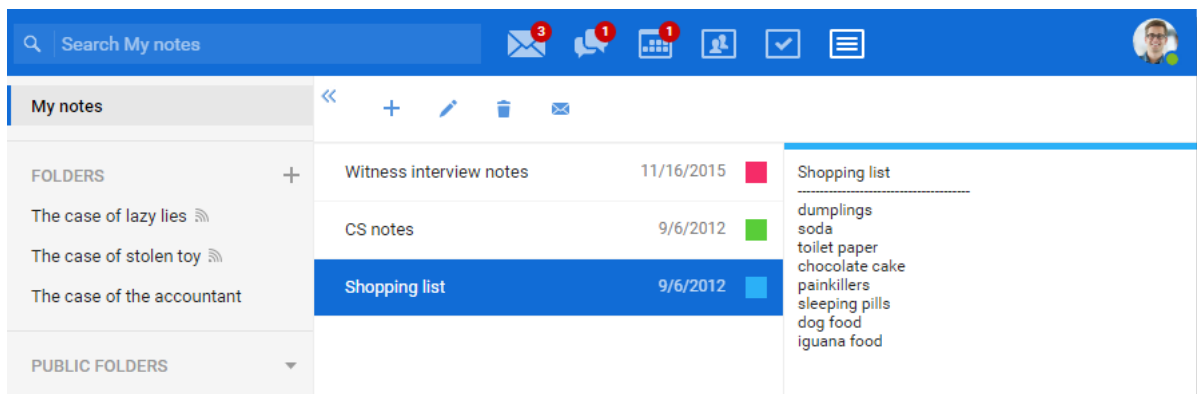
You can also share your task folders and see tasks others share with you. To learn how, read the article [Sharing in Kerio Connect](#).

Using notes in Kerio Connect Client

Creating notes

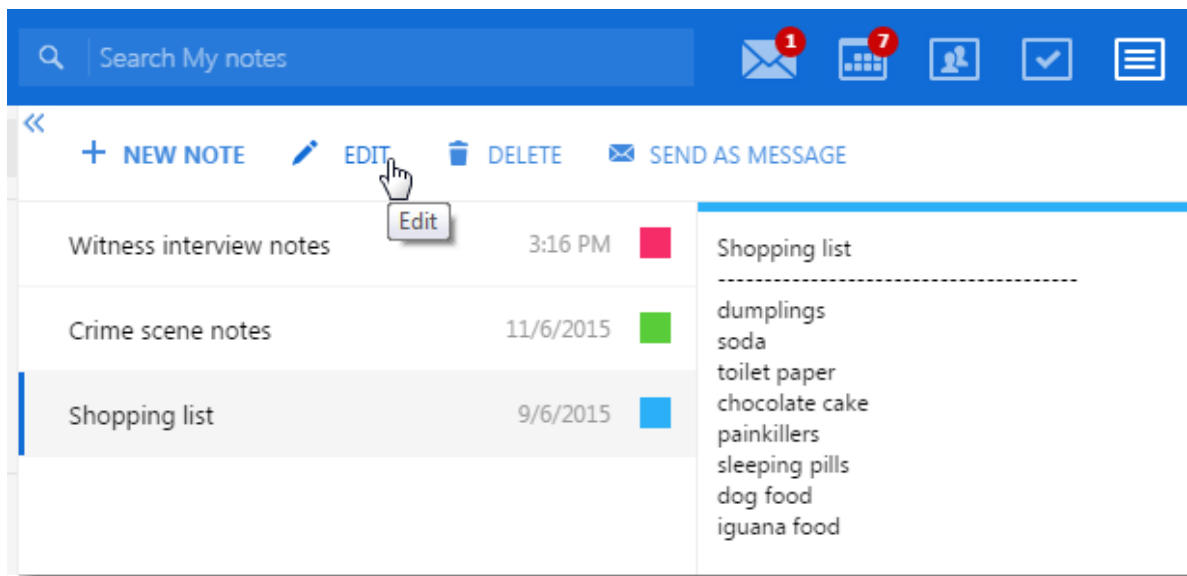
To create a new note:

1. In Kerio Connect Client, go to the **Notes** section.
2. Click **New note**.
3. Write the text.
4. Click **Save**.



Editing notes

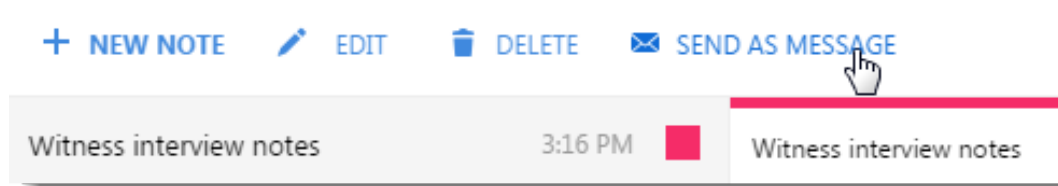
To edit a note, select the note in the list and click **Edit**.



Sending notes as email messages

You can send your note as an email message with one click.

1. In the **Notes** section in Kerio Connect Client, select a note.
2. Click **Send as Message**.



This opens a new message window containing the text of the note.

3. Compose the message as need and send.
See [Sending messages in Kerio Connect Client](#) for details.

Working with notes

In the notes section, you can:

- [Sort your notes into folders](#).
- Change the color of your note (right-click it and select a color).
- Remove a note (right-click it and select **Delete**).

Sorting notes into folders

Your default notes folder is **My notes**.

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

To move a note to a different folder, drag it from its original folder to another in the tree on the left.

Sharing your notes folders

You can share your notes and see note folders others share with you. To learn how, see the article [Sharing in Kerio Connect](#).

Searching in Kerio Connect Client

About searching

In Kerio Connect Client, you can use the **full text search feature** which allows you to search for items according to different criteria.



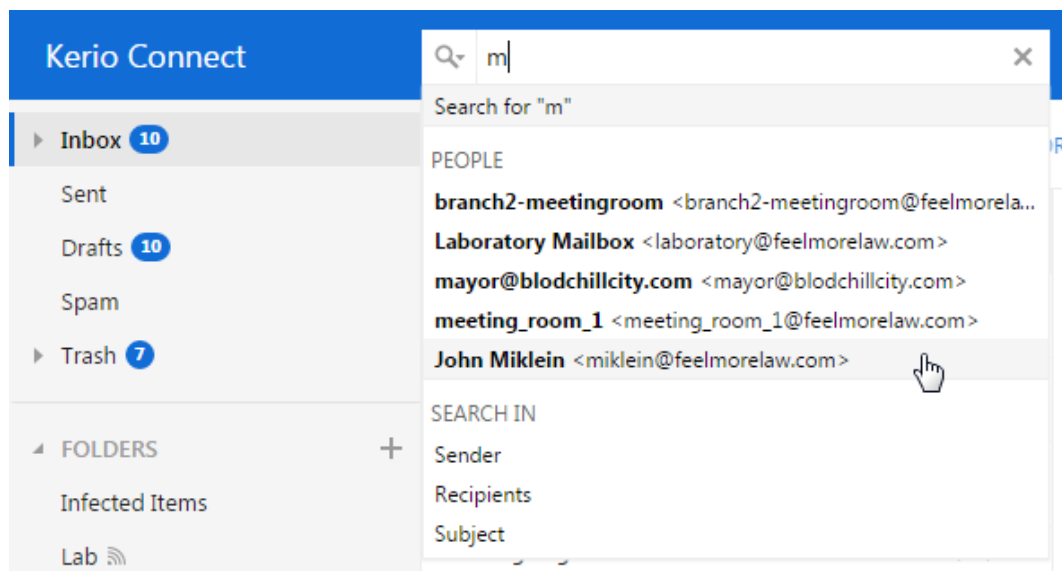
Administrators must enable this feature in the administration interface. See [Configuring data store in Kerio Connect](#) for details.

Email messages

If you need to find a specific message, use the search bar at the top of your Kerio Connect Client.

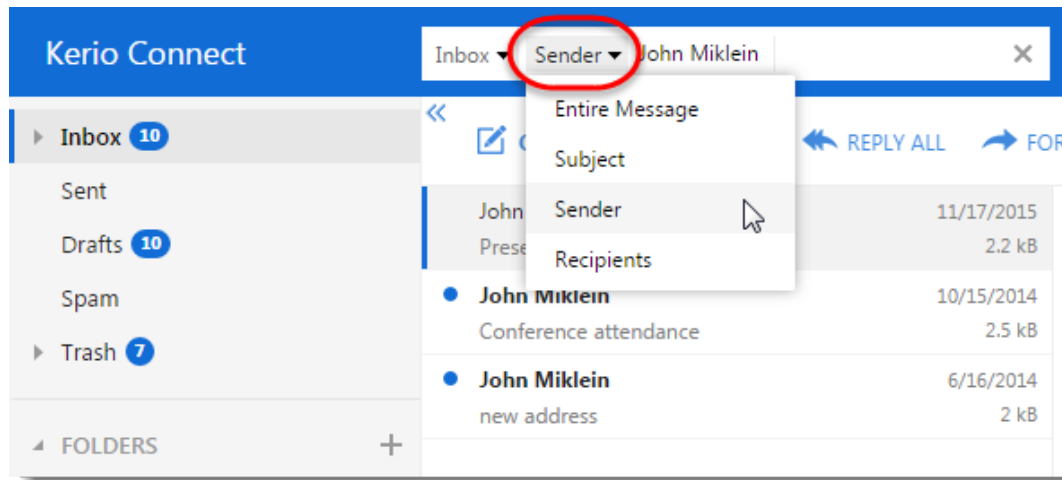
1. In the top bar search field, type a name or email address.

As you type, Kerio Connect Client automatically offers you a list of people from your contact lists.

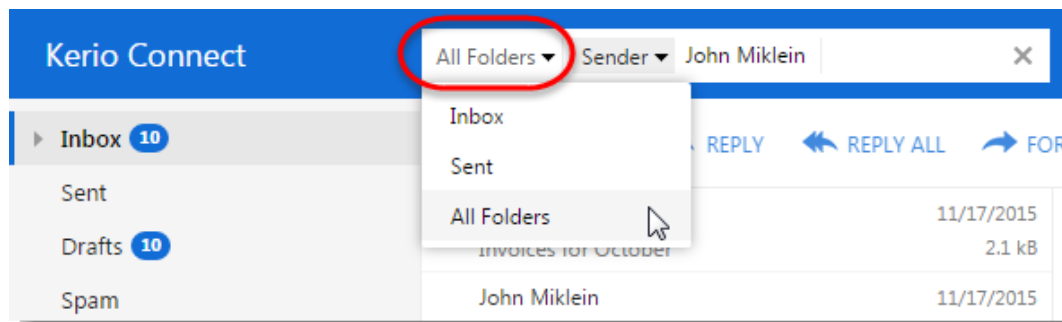


Searching in Kerio Connect Client

2. Narrow the selection to **Sender**, **Subject**, **Recipients** or **Entire Message**.



3. Narrow the selection to **Inbox**, **Sent** folder or **All Folders**.

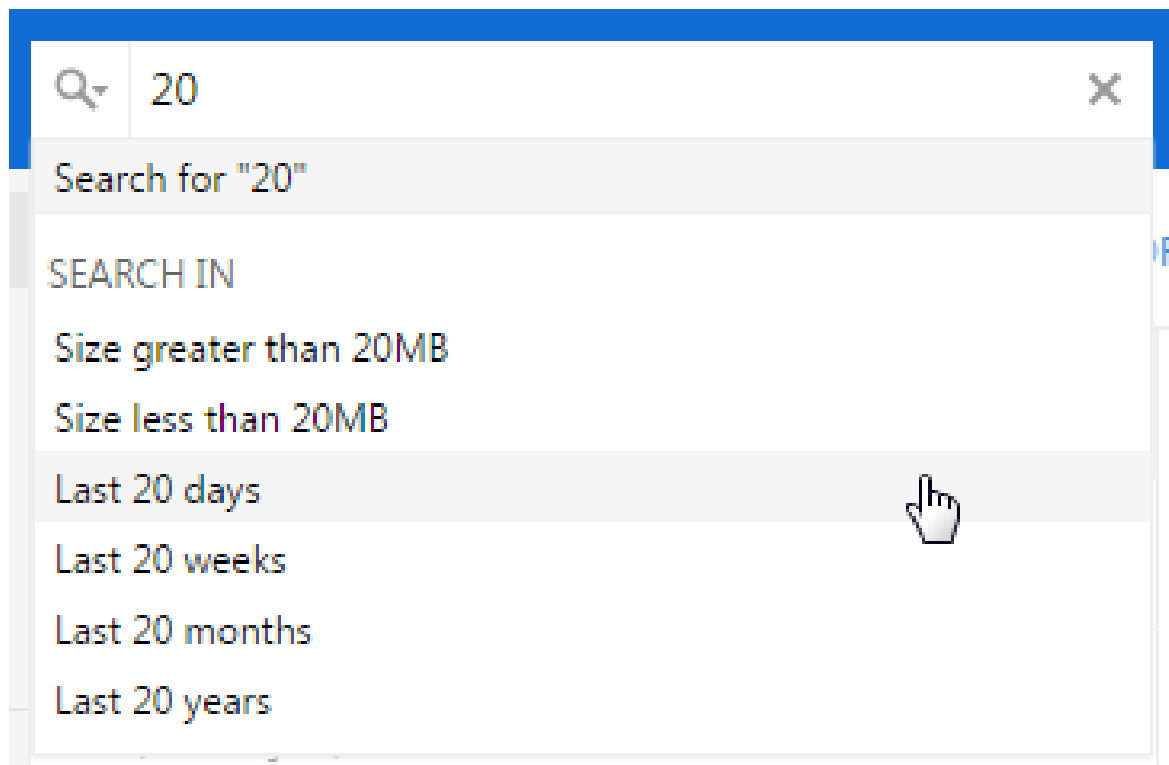


Kerio Connect Client lists the messages that match your search.

Searching by numbers

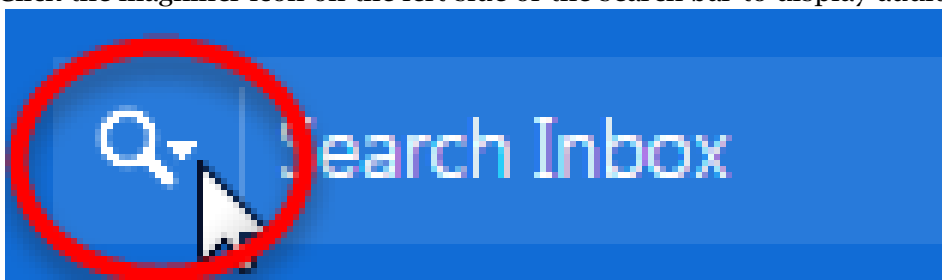
If you type a number in the search bar, you can search for messages:

- By message size
- By how long ago the message was sent or received



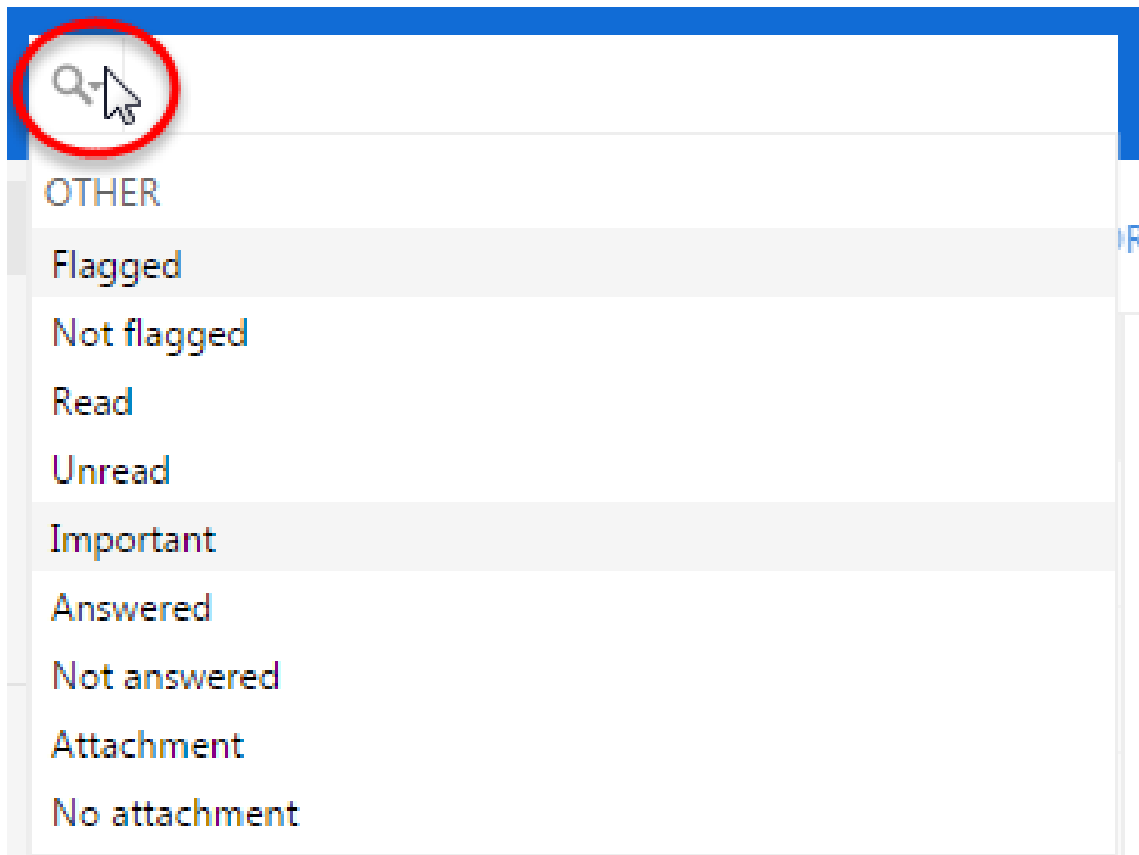
Additional searching parameters

Click the magnifier icon on the left side of the search bar to display additional search criteria.



You can search for messages:

- With or without flags
- Read or unread
- Marked as important
- Answered or not answered
- With or without attachment



To access this drop-down list any time, click in the search area and use the *down* arrow on your keyboard.

Combining searches

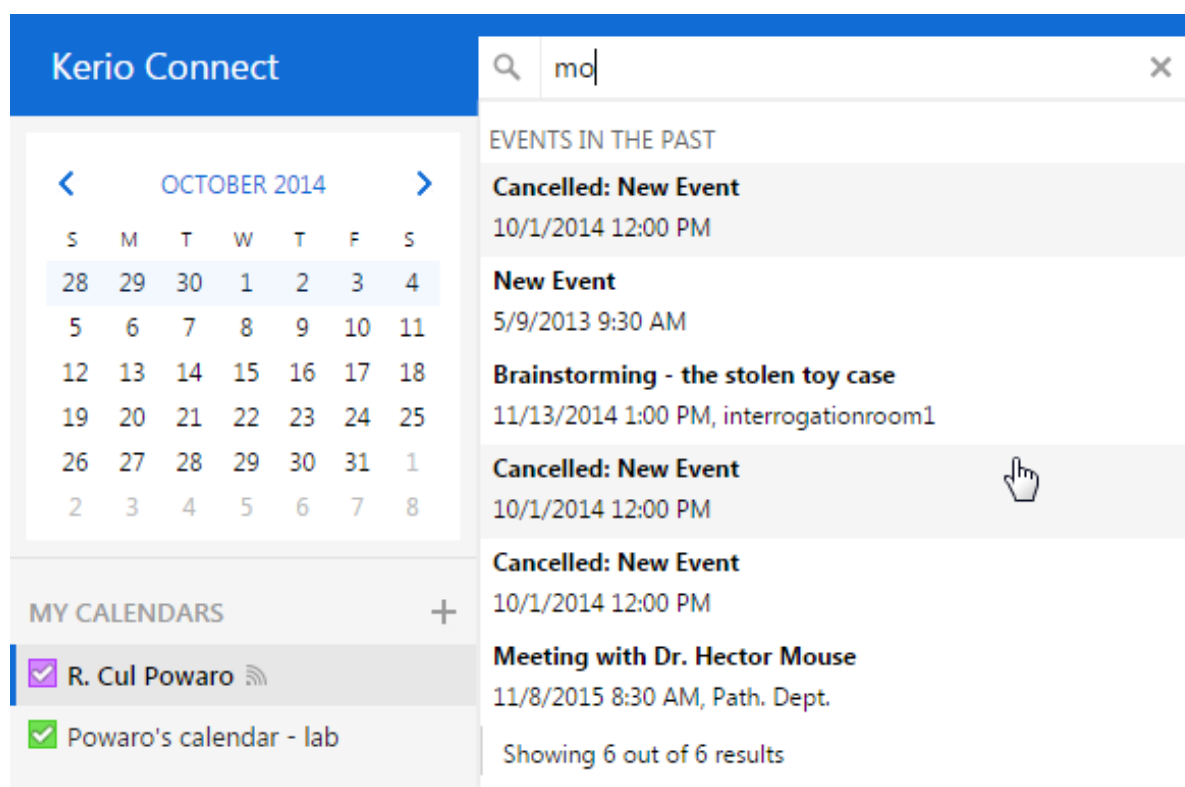
You can combine the above mentioned searches by adding the search parameters one by one.



Calendars

In the Calendar section, use the search bar to search for various information using the top bar search field.

Kerio Connect Client lists all the events which meet the search parameters.



Contacts

In the Contacts section, use the top bar search field to search for any information included in a contact.

Tasks and Notes

In the Tasks and Notes sections, use the top bar search field to search for any information included in the name and description.

Using delegation in Kerio Connect Client

About delegation

Delegation is an advanced type of [sharing](#). **Delegate** can act on your behalf: they can confirm your event invitations, and send and receive messages for you.

You can delegate only to individual users, not a group of users. However, you can delegate to as many users as you like.

Delegates can have access to your inbox and main calendar.



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

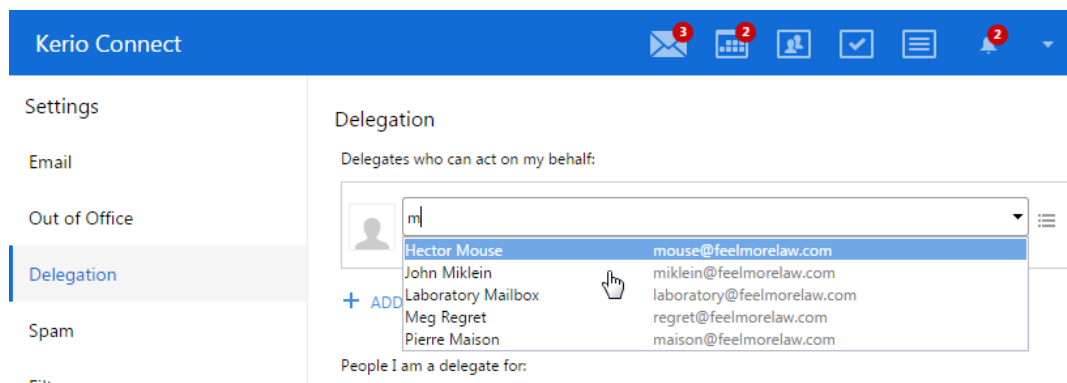
You can use the traditional [sharing feature](#) to share contacts, notes, and tasks.

Delegating users

You can delegate as many users as necessary.

1. In Kerio Connect Client, click your name and select **Settings**.
2. Go to the **Delegation** section.
3. Click **Add delegate** and type the name or email address of a user.

Kerio Connect Client offers users as you type. When you see the name of the person you want to make a delegate, select it.



- By default, your delegates have access only to your calendar (they can send and accept event invitations).

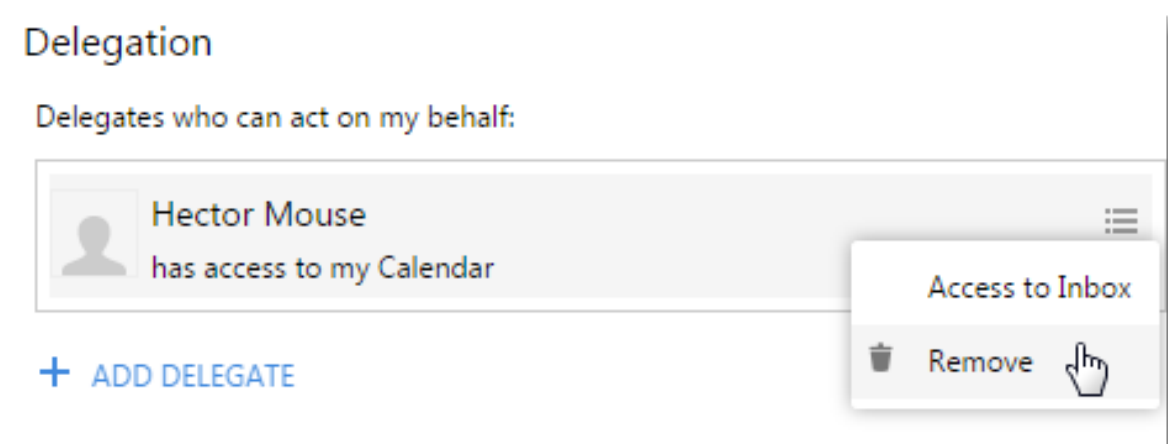
To allow access to your Inbox, click the menu icon and select **Access to Inbox**.



- Click **Save**.

Removing delegation

If you want to remove delegation rights from a user, click the menu icon and select **Remove**.



Accepting delegation

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

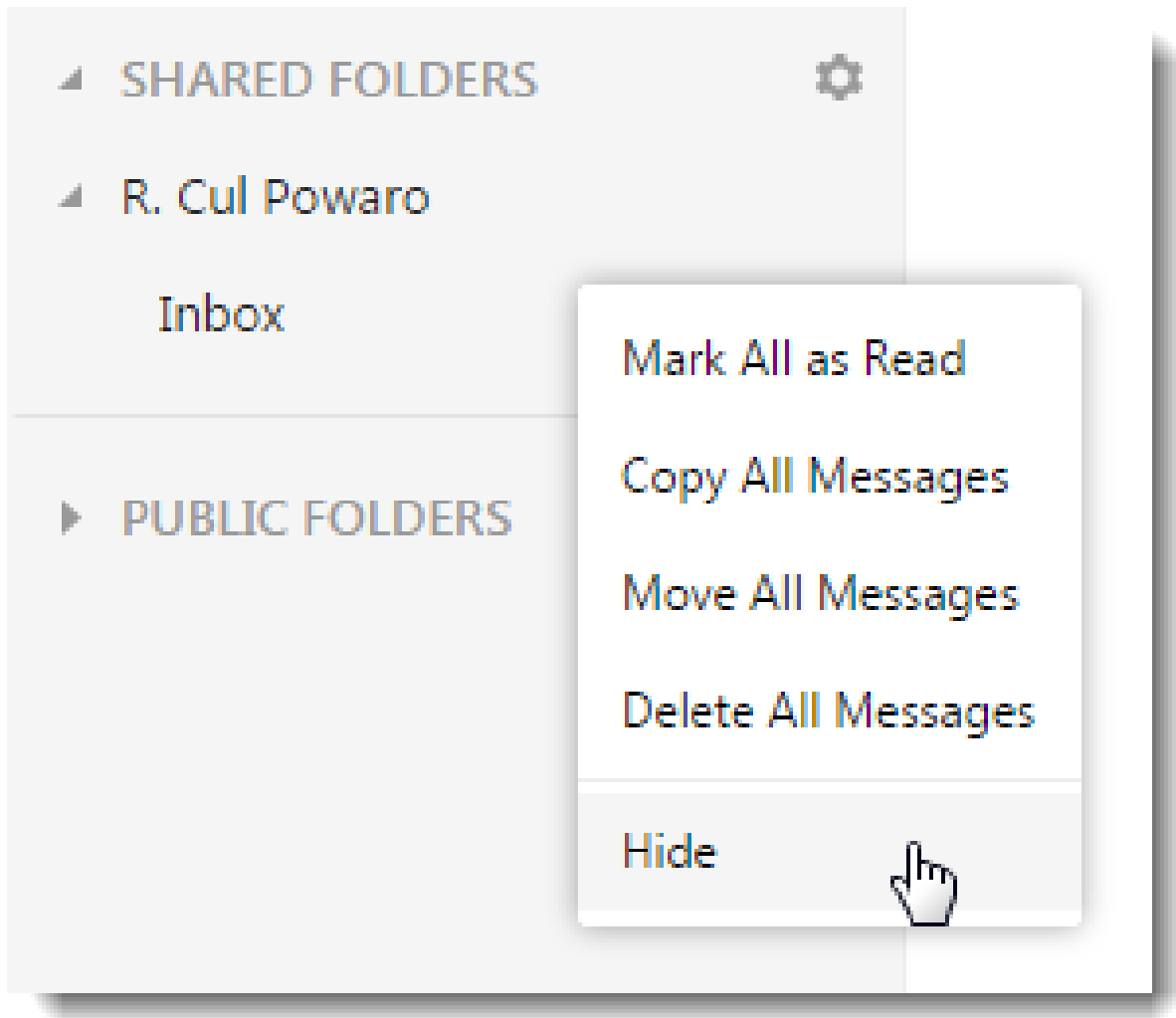
Kerio Connect Client displays that person's inbox and calendar (see [Using delegation](#) below).

You cannot reject delegation. However, you can hide the delegated folders.

Hiding a delegated inbox

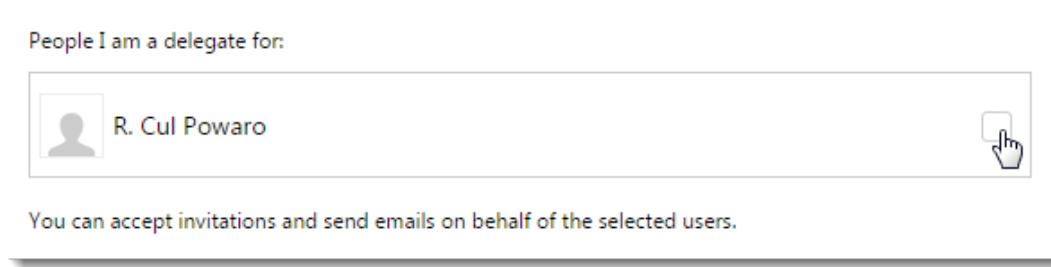
To remove a delegated inbox from your shared folders list, right-click the folder and select **Hide**.

You are still a delegate — you can send messages on the person's behalf — but you cannot see their inbox.



Hiding all delegated folders

1. In Kerio Connect Client, click your name and select **Settings**.
2. Go to the **Delegation** section.
3. In **People I am a delegate for**, clear the dialog box next to the person's name.



4. Click **Save**.

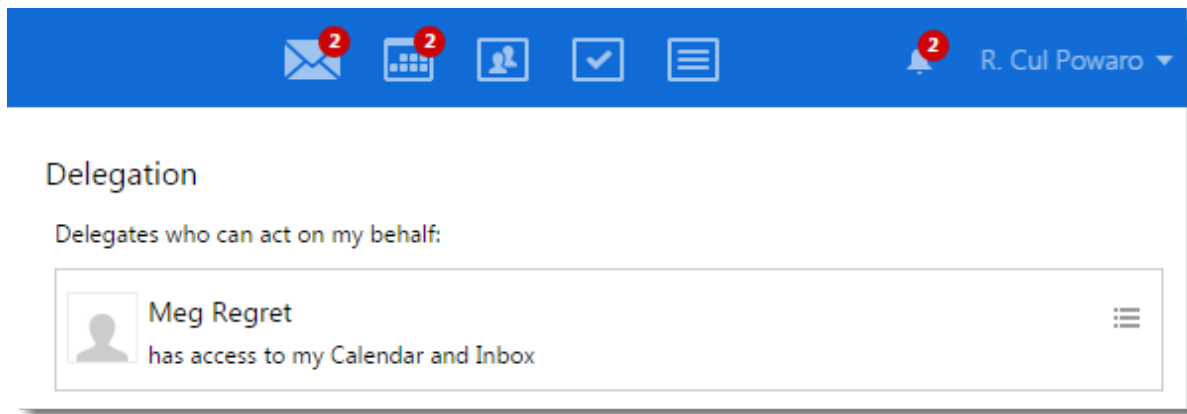
Now, you cannot send messages or create/accept events on another person's behalf. Select the dialog box again to restore your delegation rights.

Using delegation: Examples

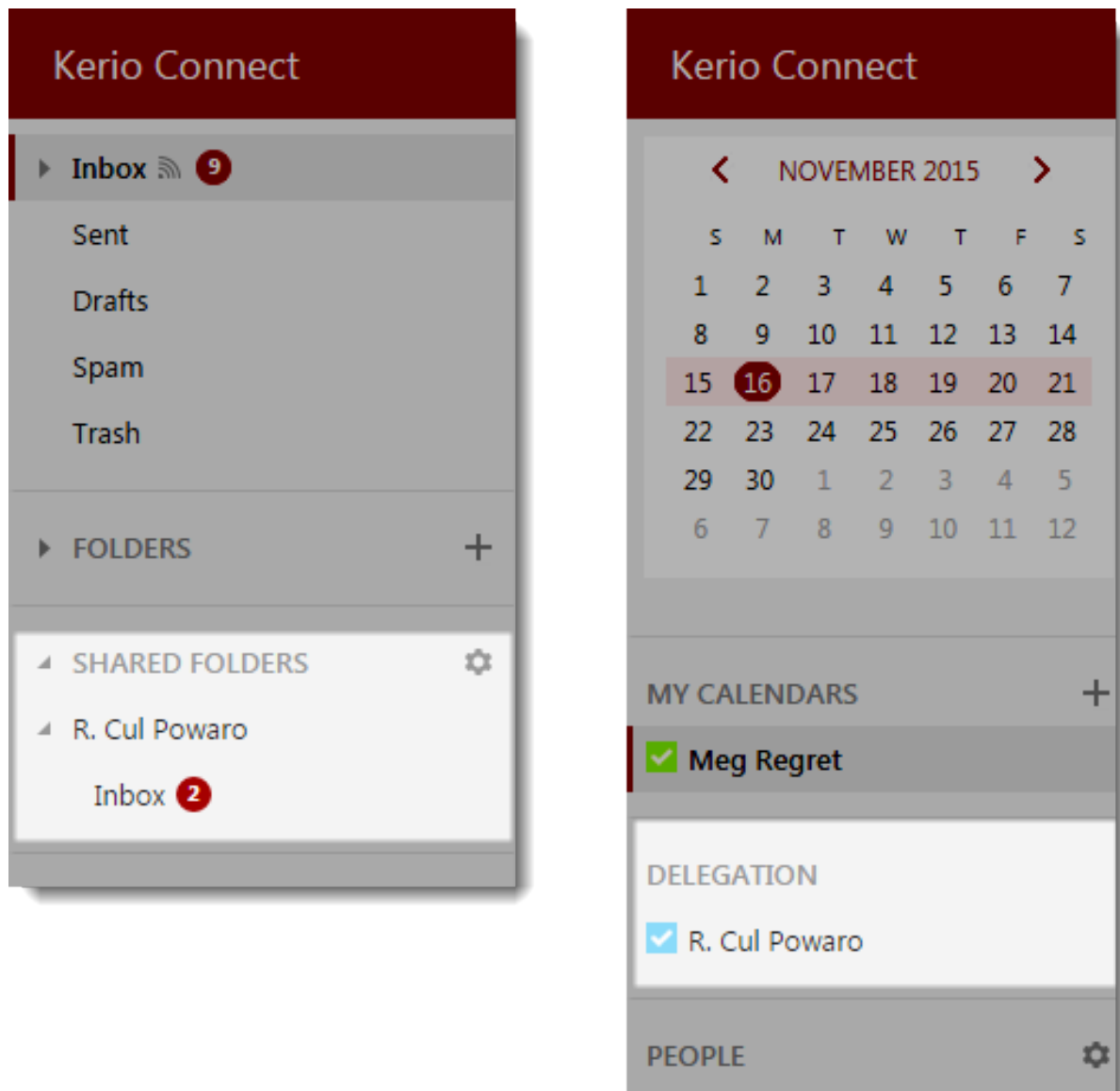
The following examples describe how to use delegation in Kerio Connect Client.

Delegating users

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

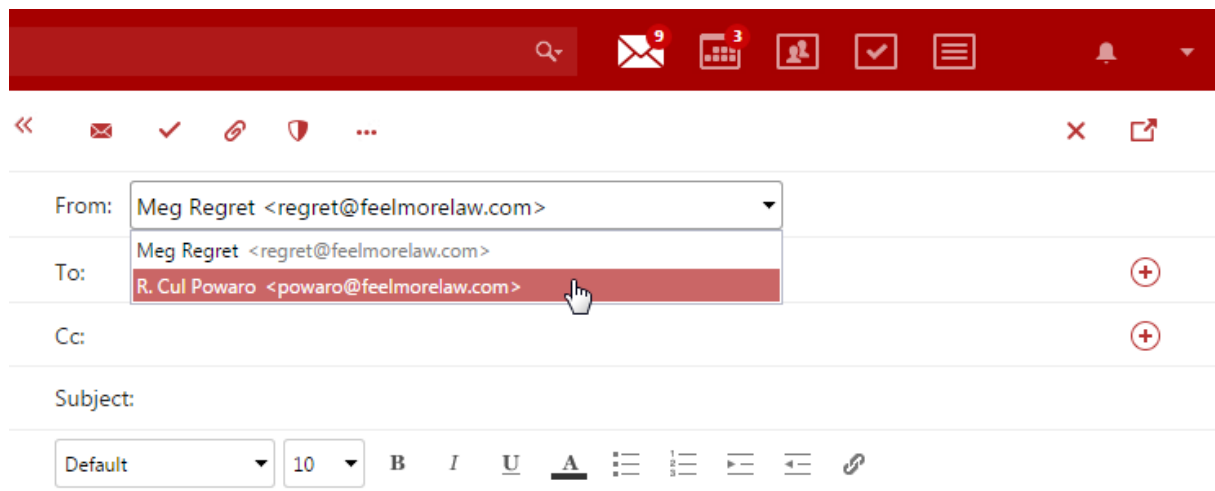


Meg automatically becomes a delegate and her Kerio Connect Client displays Mr. Powaro's inbox and calendar.

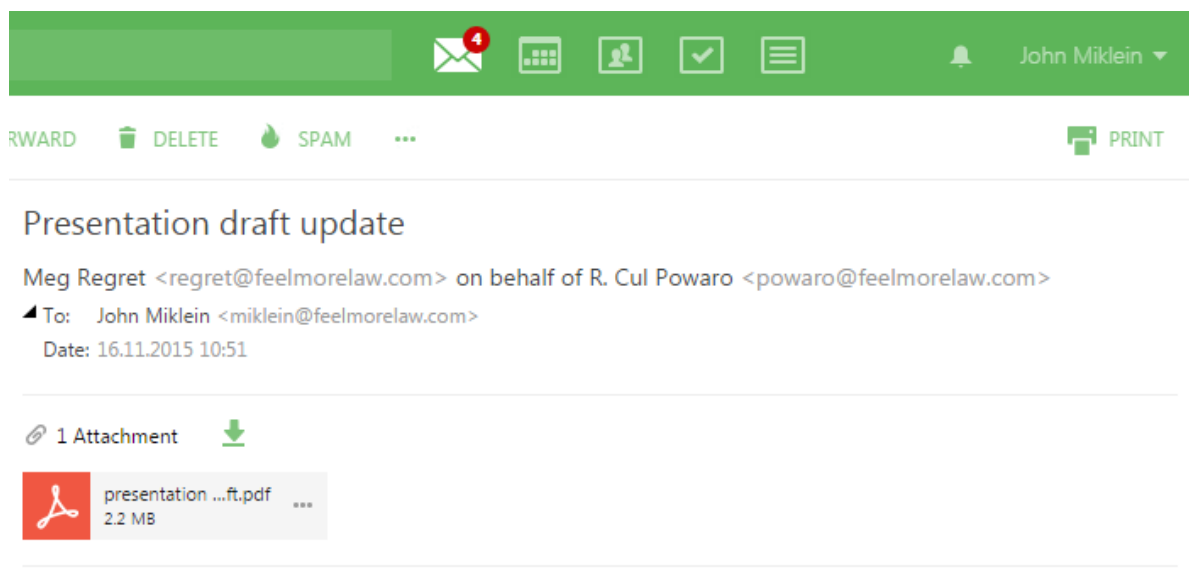


Sending and receiving emails

When Meg Regret wants to send a message on behalf of Mr. Powaro, she selects his address from the drop-down menu before composing a message.



When the message arrives, the recipient can see that Mr. Powaro has delegated Meg Regret to act on his behalf.



Creating and accepting calendar events

When Meg Regret wants to create an event on behalf of Mr. Powaro, she selects his calendar from the drop-down menu when creating an event.

When the invitation arrives, recipients can see it was sent by Mr. Powaro.

Using delegation in Kerio Connect Client

The image displays two screenshots of the Kerio Connect Client interface, illustrating the process of accepting a meeting invitation on behalf of another user.

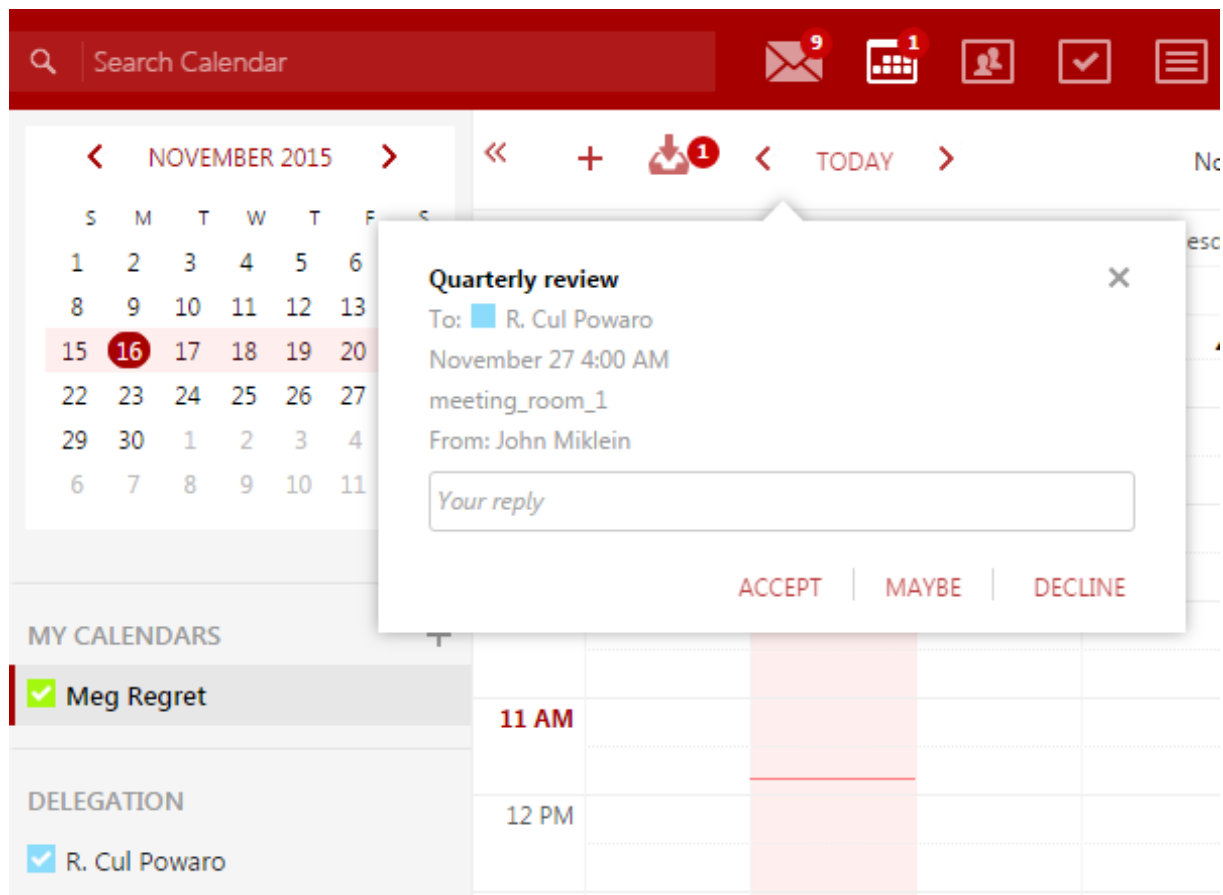
Left Screenshot (Meg Regret's view):

- Title:** Lunch with the Mayor
- Where:** Le Restaurant
- All day event:** ☐
- Start:** 11/24/2015, 12:30 PM
- End:** 11/24/2015, 2:30 PM
- Attendees:** John Miklein (checked)
- Repeat:** None
- Travel time:** 15 minutes
- Reminder:** When I need to leave
- Label:** Important
- Show As:** Out of office
- Calendar:** R. Cul Powaro
- Private:** ☐
- Description:** (empty text area)
- Buttons:** PRINT, SAVE, CANCEL

Right Screenshot (John Miklein's view):

- Title:** Lunch with the Mayor
- Where:** Le Restaurant
- Start:** 24.11.2015, 12:30
- End:** 24.11.2015, 14:30
- Attendees:** R. Cul Powaro (organizer), John Miklein
- Repeat:** None
- Travel time:** 0 minutes
- Reminder:** 15 minutes
- Label:** Important
- Show As:** Busy
- Calendar:** John Miklein
- Buttons:** Accept, Maybe, Decline
- Bottom Buttons:** PRINT, SAVE, CANCEL

Mr. Miklein invites Mr. Powaro to a meeting. Meg Regret sees the invitation sent to Mr. Powaro and can accept it on his behalf.



Sharing in Kerio Connect Client

Overview



For versions prior to 8.4, see [this article](#).

In Kerio Connect Client you can share any folder with other users.

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

This article describes how to:

- [Share folders](#)
- [Change and remove sharing rights](#)
- [Display folders people share with you](#)
- [Hide shared folders](#)

Sharing folders

Sharing email folders



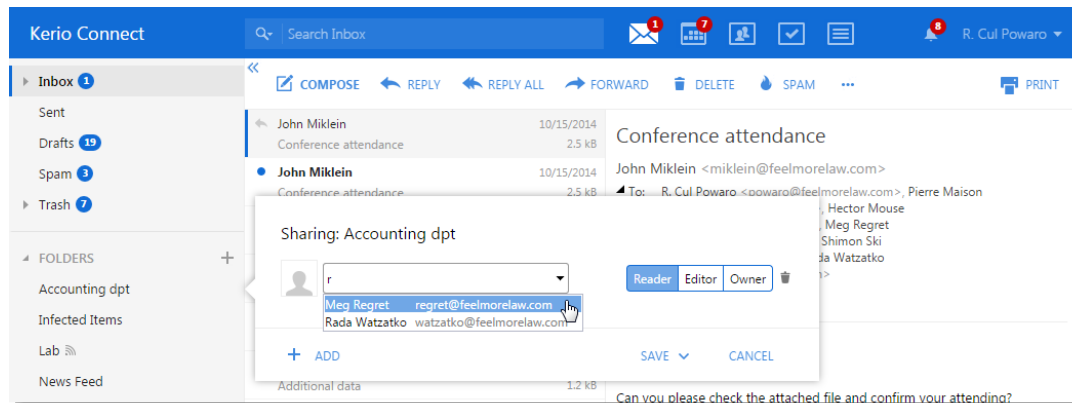
To share your Inbox, you can use traditional sharing or [delegation](#).

1. In your Kerio Connect Client, go to the **Emails** section.
2. Click the arrow next to the email folder name and select **Sharing**.



In Kerio Connect 8.4, you can share any email folder, including the **Sent** and **Trash** folders.

3. Click the plus sign and start typing the name or email address of a user or group.
As you type, Kerio Connect Client offers you addresses from your contact lists.



4. Click the plus sign and the down arrow to share with:

- Everyone in your company — Select **Everyone from <your company>**.
- Everyone from the server — Select **Everyone from server**.



Do not use **Everyone from server** if you use [Kerio Cloud](#)!

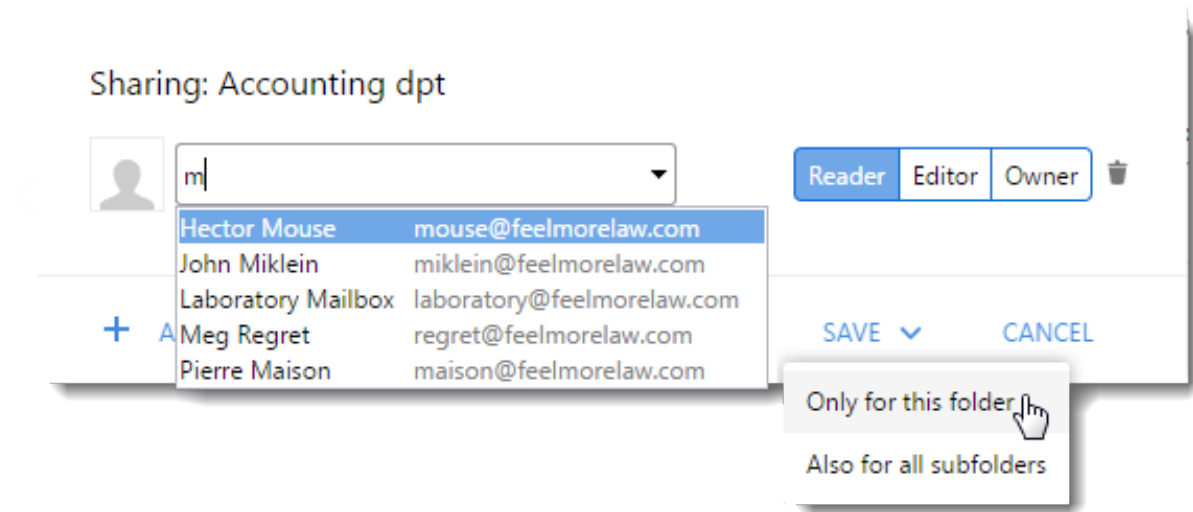
5. Specify the rights for each user you share the folder with:

- **Reader** — Users can only see the messages.
- **Editor** — Users can add, delete, and edit messages.
- **Owner** — Users can set sharing as well as add, delete and edit messages.

6. **Save** your settings.

By default, you set the access rights for this folder only. To set the same access rights for the subfolders, click the arrow next to **Save** and select **Also for all subfolders**.

Sharing in Kerio Connect Client

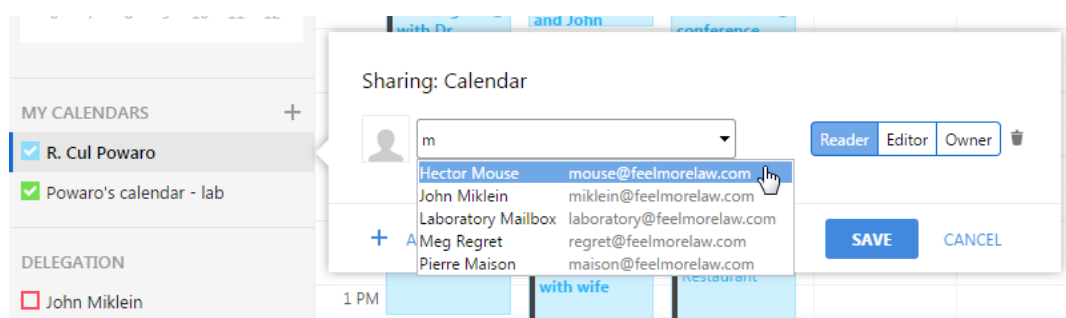


Sharing calendars



To share your calendar, you can use traditional sharing or [delegation](#).

1. In your Kerio Connect Client, go to the **Calendars** section.
2. Click the arrow next to the calendar name and select **Sharing**.
3. Click the plus sign and start typing the name or email address of a user or group. As you type, Kerio Connect Client offers you addresses from your contact lists.

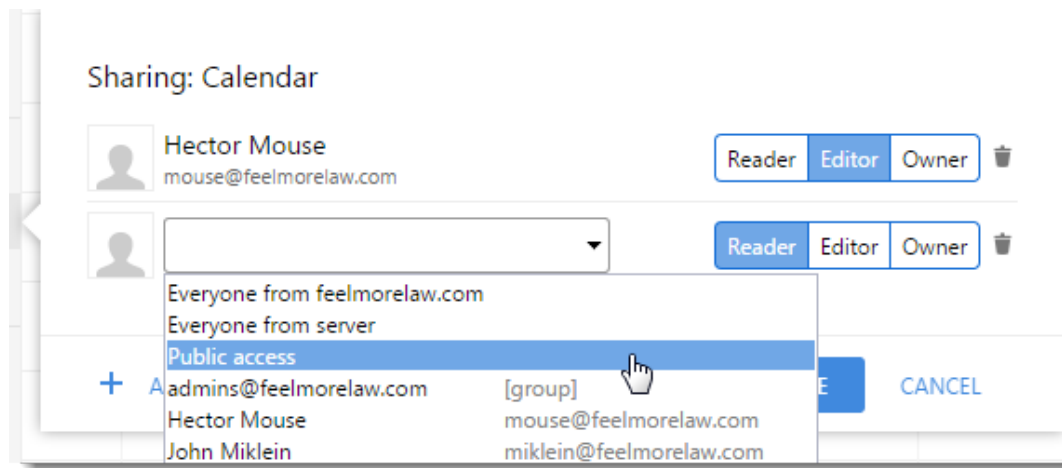


4. Click the plus sign and the down arrow to share with:
 - Everyone in your company — Select **Everyone from <your company>**.
 - Everyone from the server — Select **Everyone from server**.



Do not use **Everyone from server** if you use [Kerio Cloud](#)!

- Anonymous users — Select **Public access**.



5. Specify the rights for each user you share your calendar with:
 - **Reader** — Users can only see the events (automatically set for **Public access**).
 - **Editor** — Users can add, delete, and edit events.
 - **Owner** — Users can set sharing as well as add, delete and edit events.
6. Click **Save**.

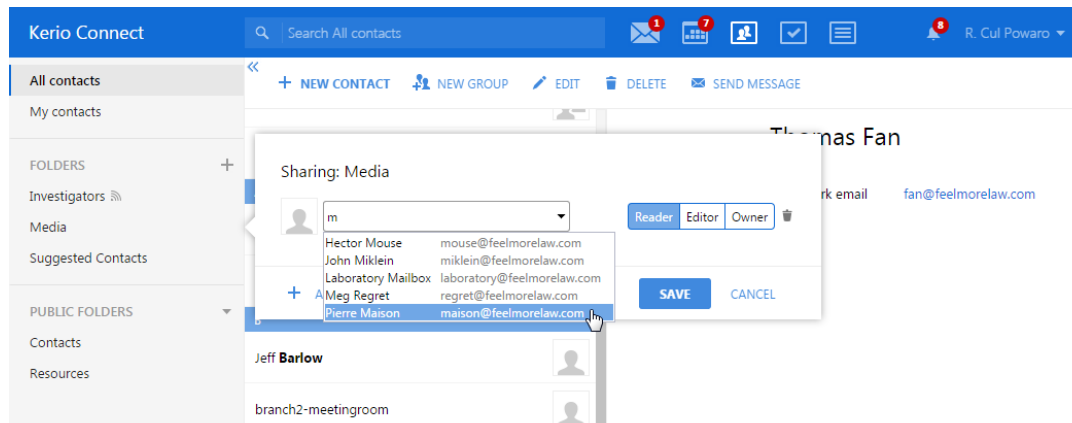


Only the original owner can change events with more attendees. However, you can use [delegation](#) instead of sharing — delegates can edit your events with multiple users.

Sharing contacts, notes, and task folders

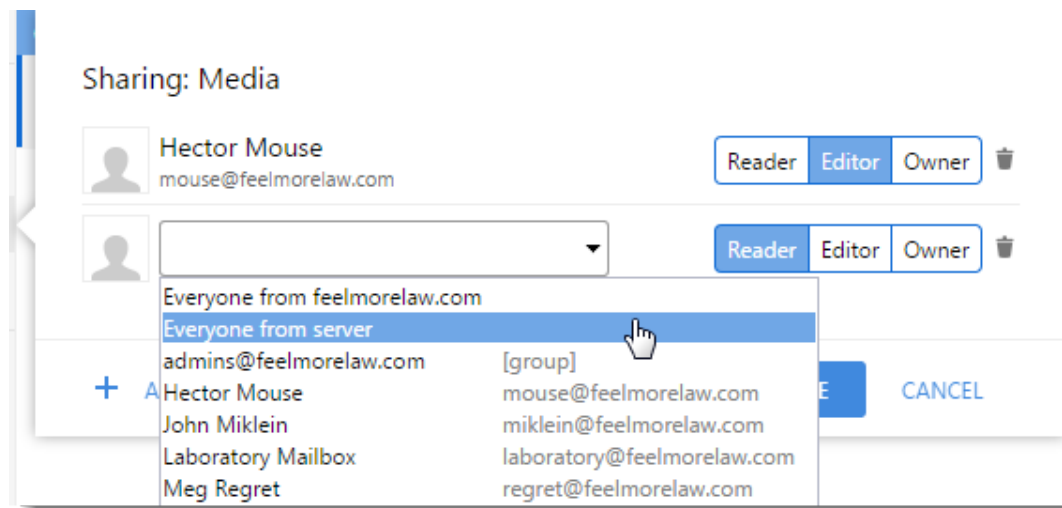
1. In your Kerio Connect Client, go to the **Contacts** , **Notes**, or **Tasks** section.
2. Click the arrow next to the folder name and select **Sharing**.
3. Click the plus sign and start typing the name or email address of a user or group.
As you type, Kerio Connect Client offers you addresses from your contact lists.

Sharing in Kerio Connect Client



4. Click the plus sign and the down arrow to share with:

- Everyone in your company — Select **Everyone from <your company>**.
- Everyone from the server — Select **Everyone from server**.



5. Specify the rights for each user you share the folder with:

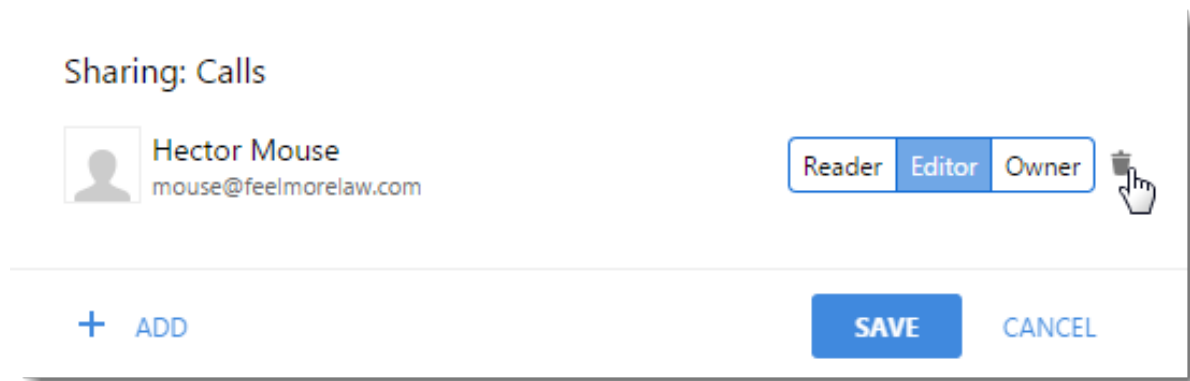
- **Reader** — Users can only see the items.
- **Editor** — Users can add, delete, and edit items.
- **Owner** — Users can set sharing as well as add, delete and edit items.

6. Click **Save**.

Changing and removing sharing rights

To change sharing rights for any user, go to the **Sharing** dialog box and select a different level of rights (Reader, Editor, Owner).

To stop sharing with a user, click the **Trash** icon.



Displaying shared folders

Emails, contacts, notes, tasks

If someone shares an email, contact, notes or task folder with you, follow these steps to subscribe to the shared folders:

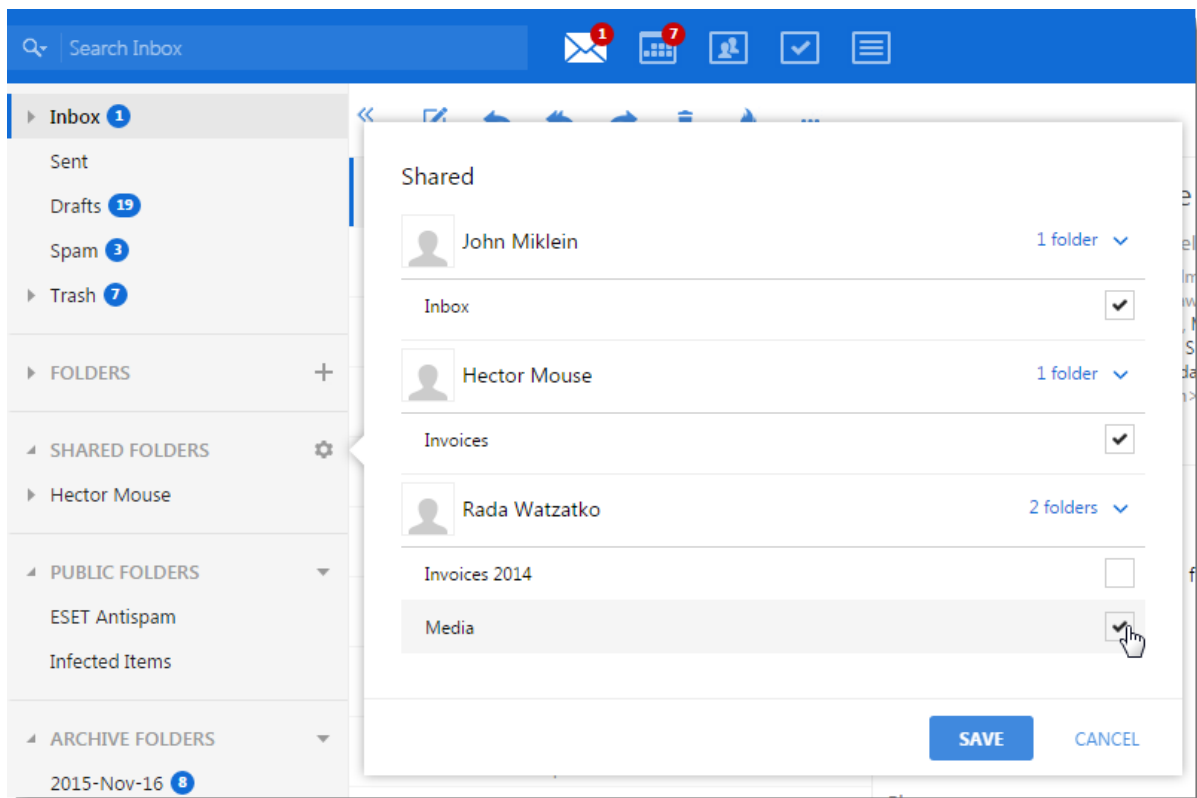
1. In the appropriate section (Emails, Contacts, Notes, or Tasks), click the **menu** icon next to **Shared folders**.

This displays a list of users and the number of folders that person shares with you.

2. Click a user to see all the folders they share with you.
3. Select the folders you want to display in your Kerio Connect Client.

Kerio Connect Client displays the folders immediately in the folder tree.

Sharing in Kerio Connect Client



Calendars

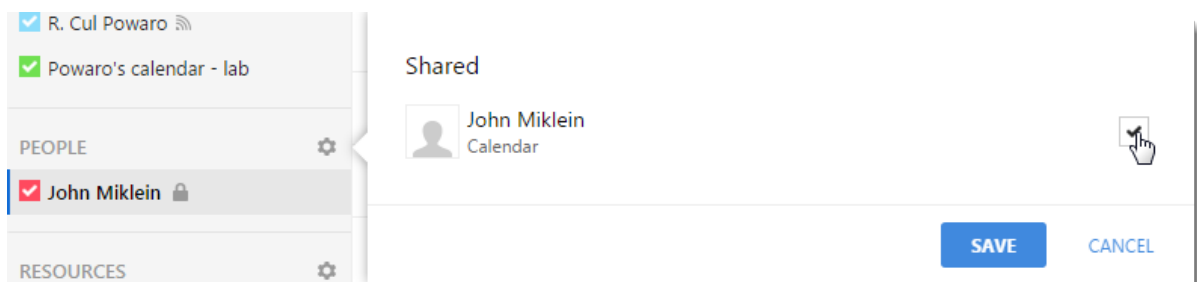
If someone shares a calendar with you, follow these steps to subscribe to the shared folders:

1. In Kerio Connect Client, go to the **Calendars** section..
2. Click the **menu** icon next to **People**.
3. In the list of calendars shared with you, select the calendars you want to display.

Now you can work with the shared calendars [as your rights permit](#).



If events also have attendees other than the original owner, you cannot change those events regardless of your rights.



Hiding shared folders

To unsubscribe a shared folder, go to the sharing dialog and unselect the shared folder.

To hide the shared calendar, unselect next to the calendar name (you can display the calendar later again).

Synchronizing folders with mobile devices

Overview

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

Selecting folders to synchronize

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**.

If you [subscribe to shared](#) or [public](#) folders, they are also available in the list of folders to synchronize.

If you are a [resource reservation manager](#), you can synchronize resource calendars as well.



CalDAV/CardDAV

Select folders to synchronize with your iCal and CalDAV/CardDAV client:

[Check all](#) | [Uncheck all](#)

☒	Calendar
☒	Calls tasks
☒	Cases tasks
☒	My contacts
☒	Personal tasks
☒	Powaro's calendar - lab
☒	My tasks
☐	Calendar - branch2-meetingroom (resource)
☒	Contacts (public folder)
☐	Launch dates (public folder)

Exchange ActiveSync

Select folders to synchronize with your Exchange ActiveSync client:

Check all Uncheck all
~powaro@feelmorelaw.com
☒ Inbox
☒ Contracts & Invoices
☒ Sales
☒ Accounting dpt
☒ Calendar
☒ Calls tasks
☒ My contacts
☒ Trash
☒ Invoices
☒ The case of stolen toy
☒ The case of the accountant
SHARED FOLDERS - John Miklein
☐ Calendar
ARCHIVE FOLDERS
☐ 2015-Nov-16
PUBLIC FOLDERS
☐ Contacts
☐ ESET Antispam
☐ Infected Items
☐ Launch dates
☐ Resources
RESOURCES
☐ branch2-meetingroom



If you synchronize your Kerio Connect account via Exchange ActiveSync to an iOS device, the **Drafts** folder will not synchronize (due to the limitations of Exchange ActiveSync and the iOS device).

Making calls from Kerio Connect Client

Overview

In Kerio Connect Client, you can call any number from a message or from contact details just by clicking the number.

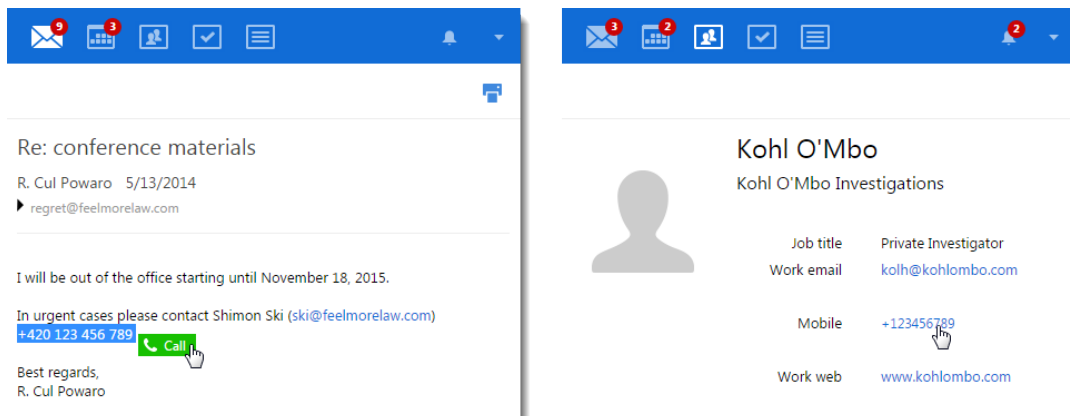
If you have this feature available, you can see the **Click to Call** section in your Kerio Connect Client (click your name and select **Settings**).

If you don't see the **Click to Call** section, contact your administrator. Administrators must [enable this feature on the server](#).

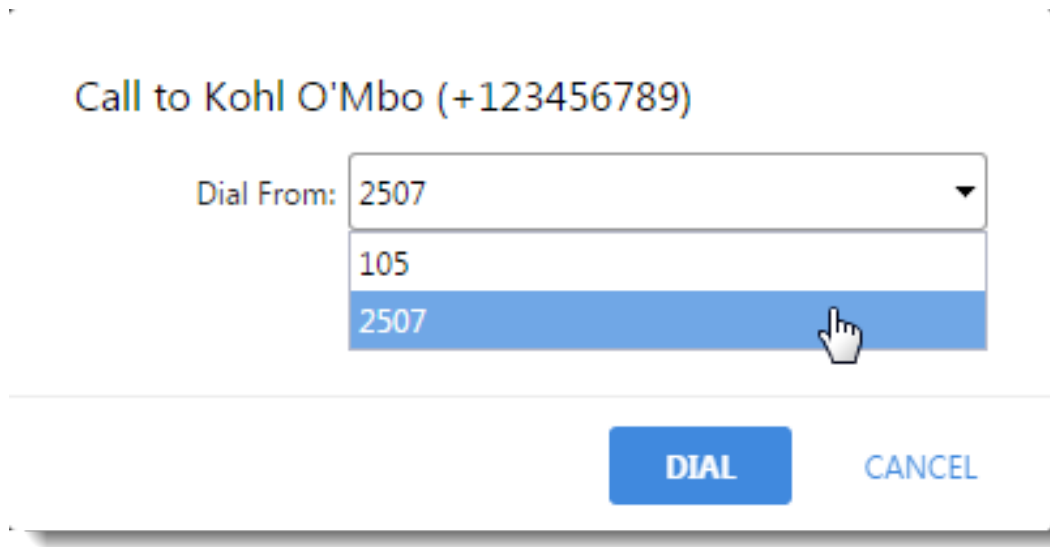
Making calls from Kerio Connect Client

To make calls from Kerio Connect Client:

1. Select the number you want to call:
 - In a message, select a number. When the **Call** icon appears, click it.
 - In contact details, click any phone number.



2. Select the extension you want to place the call from, and click **Dial**.



You can also [set a default extension](#).

3. Your desk phone or softphone starts ringing. Answer the phone.

The phone of the person you are calling starts ringing.

When the call is established, Kerio Connect Client displays information about the call duration in the bottom right corner.

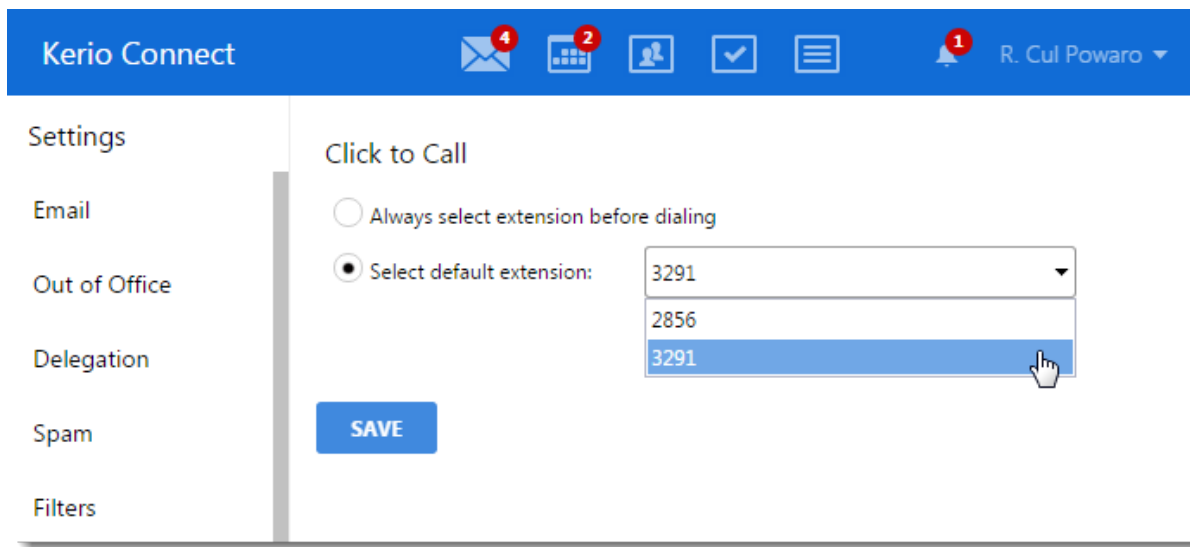
4. End the call by clicking on the **Hang up** button or the end call icon.

Selecting a default extension

If you have [more extensions in Kerio Operator](#), you can select the extension before making each call or define a default extension for all your calls.

To select a default extension:

1. Click your name in Kerio Connect Client and select **Settings**.
2. Go to the **Click to Call** section.
3. Click the **Select default extension** option and select the extension you want to make your default from the list.
4. **Save** the settings.



Pinning Kerio Connect Client to the Windows taskbar

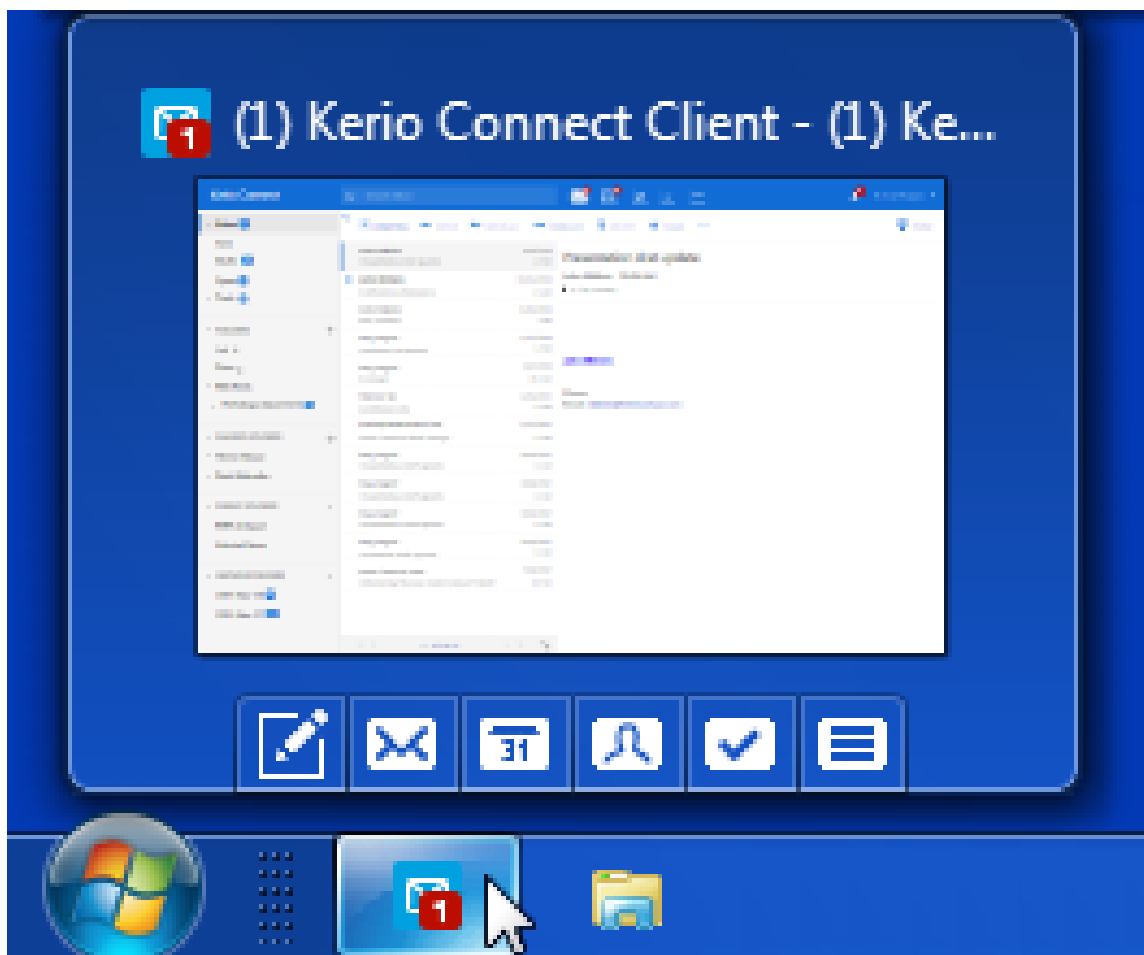
Overview



New in Kerio Connect 8.5!

To easily access your Kerio Connect Client, you can pin the Internet Explorer tab with Kerio Connect Client to your Windows taskbar.

The resulting icon works as a bookmark to your Kerio Connect Client.



Prerequisites

You must have:

- Internet Explorer 9 or later
- Microsoft Windows 7 or later
- Kerio Connect 8.5 and later

Pinning Kerio Connect Client to taskbar

1. In Internet Explorer, open your Kerio Connect Client in a new tab.
2. Drag the tab to the Windows taskbar.



3. Drop the tab when **Pin to Taskbar** appears.

Using the pinned Kerio Connect Client

The Kerio Connect Client icon stays displayed on your taskbar as a bookmark.



To access your inbox, click the icon, and Kerio Connect Client opens in Internet Explorer.

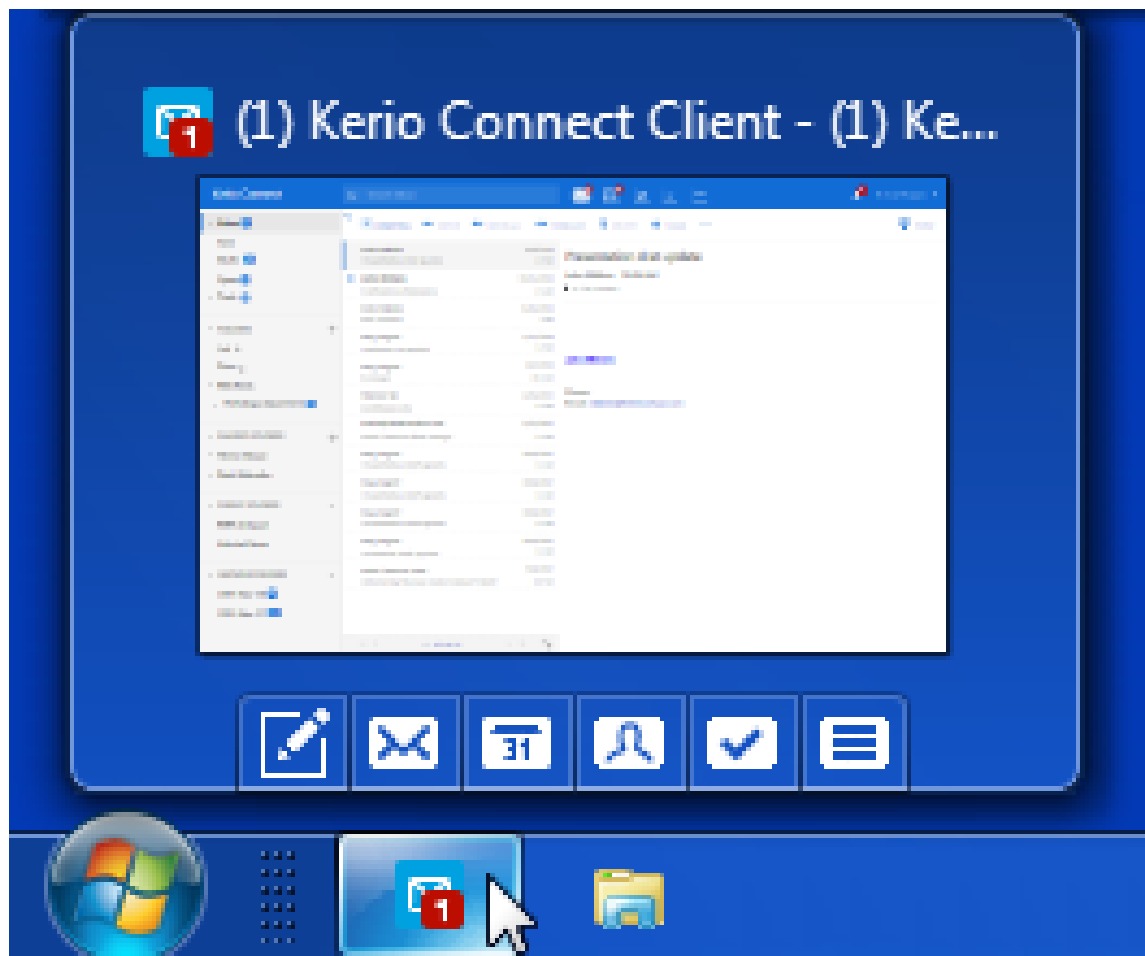
When you are logged in, the icon in the taskbar shows the number of unread messages in your inbox.

Pinning Kerio Connect Client to the Windows taskbar



Hover your mouse over the icon then:

- To open the compose message window, click the  icon
- To go to specific sections in Kerio Connect Client, click any of these icons:     



Configuring clients for instant messaging

Recommended IM clients



For information about sending chat messages through Kerio Connect Client, read [Sending chat messages in Kerio Connect Client](#).

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

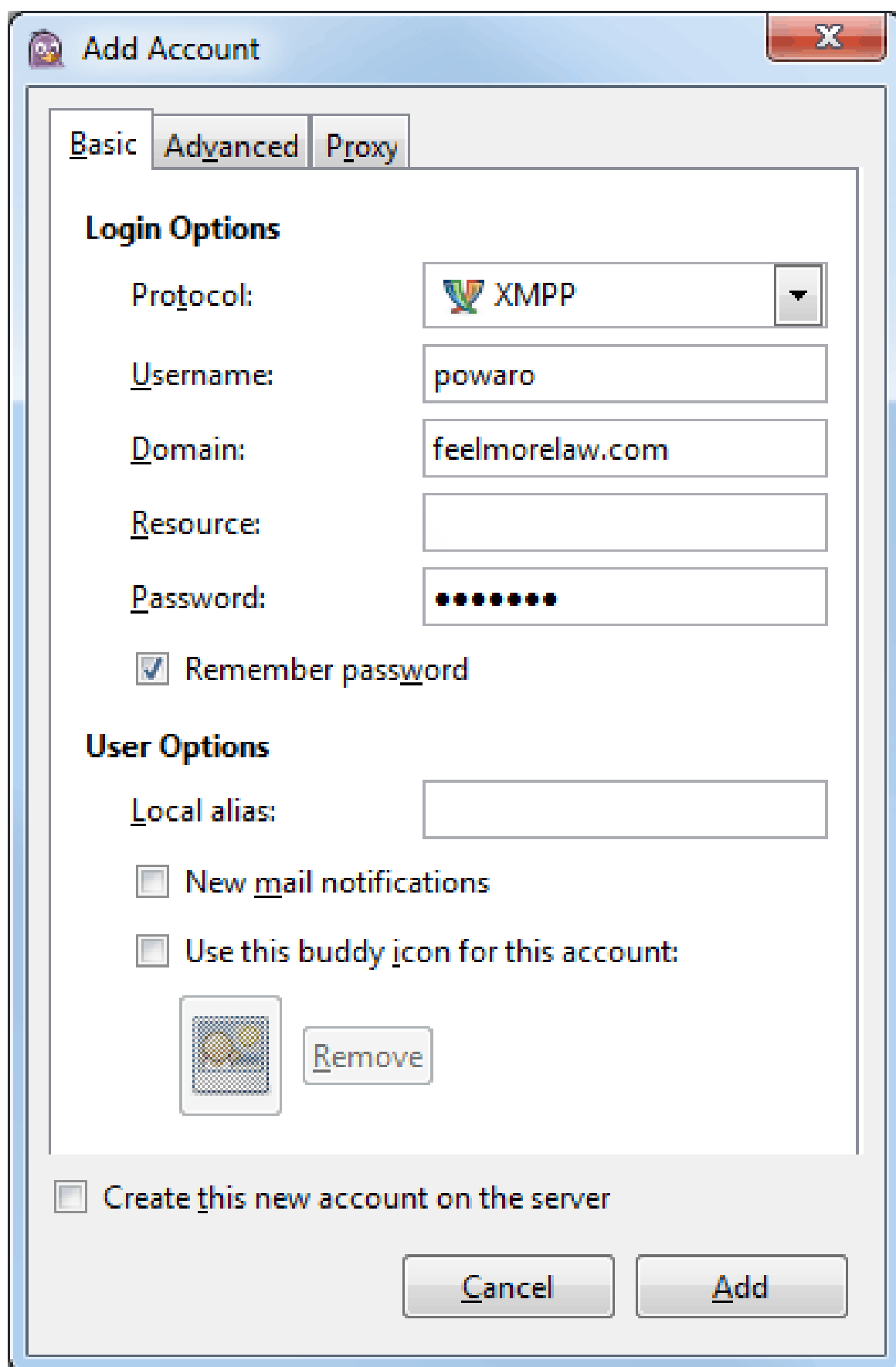
Kerio instant messaging service supports the following features:

- 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 chat (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.

A screenshot of a 'Add Account' dialog box. The dialog has a title bar with a small icon and a close button. It contains three tabs: 'Basic', 'Advanced', and 'Proxy'. The 'Basic' tab is selected. Under 'Login Options', there are fields for Protocol (set to XMPP), Username (powaro), Domain (feelmorelaw.com), Resource (empty), and Password (masked with dots). There is a checked checkbox for 'Remember password'. Under 'User Options', there is a field for 'Local alias' (empty), and two unchecked checkboxes: 'New mail notifications' and 'Use this buddy icon for this account:'. Below the second checkbox is a small icon of a person and a 'Remove' button. At the bottom, there is an unchecked checkbox for 'Create this new account on the server' and two buttons: 'Cancel' and 'Add'.

Add Account

BasicAdvancedProxy

Login Options

Protocol: XMPP

Username: powaro

Domain: feelmorelaw.com

Resource:

Password: ●●●●●●●●

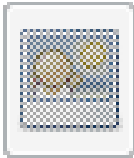
☒ Remember password

User Options

Local alias:

☐ New mail notifications

☐ Use this buddy icon for this account:

Remove

☐ Create this new account on the server

CancelAdd

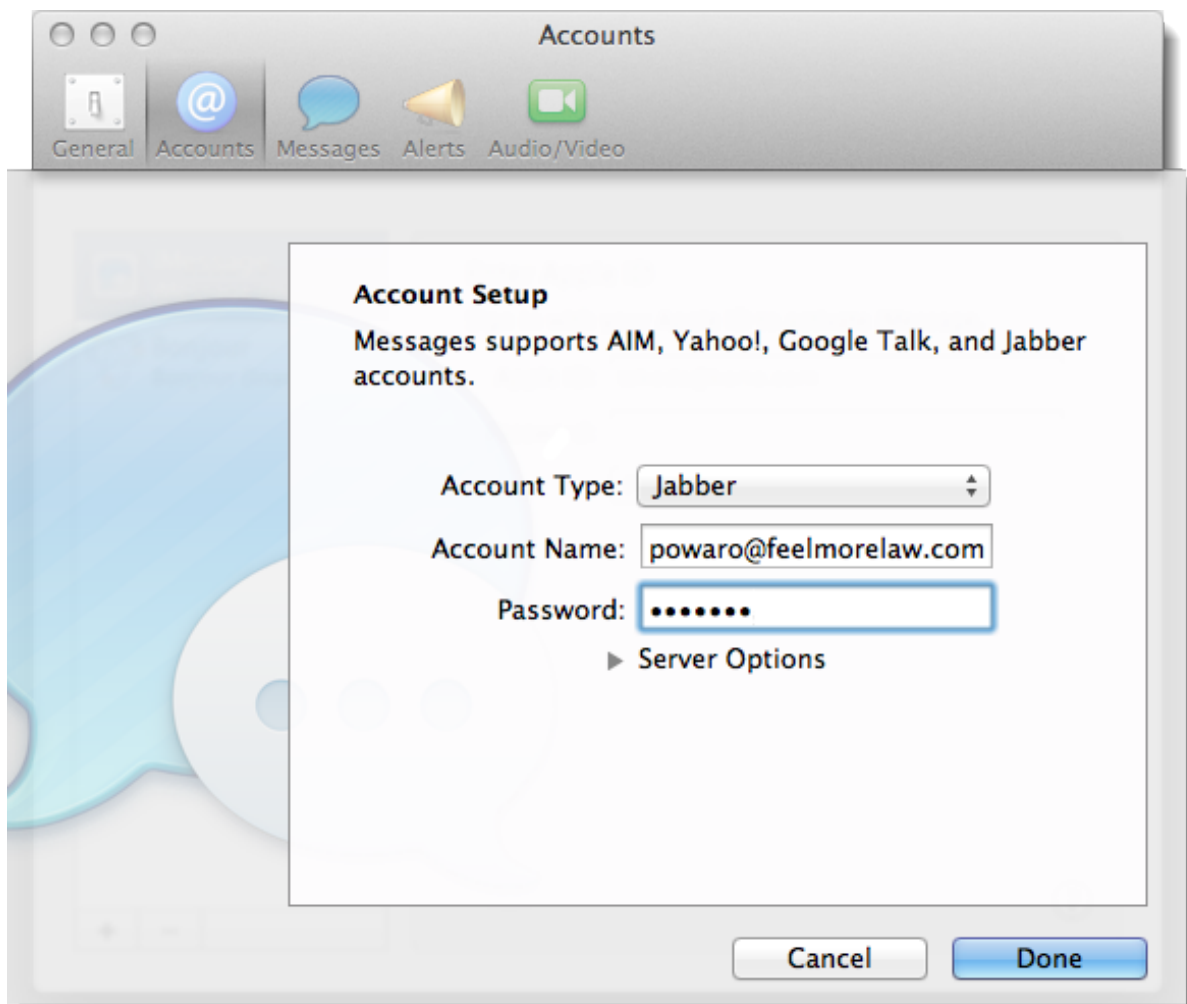
Configuring Messages on Mac OS X

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

For manual configuration, follow these steps:

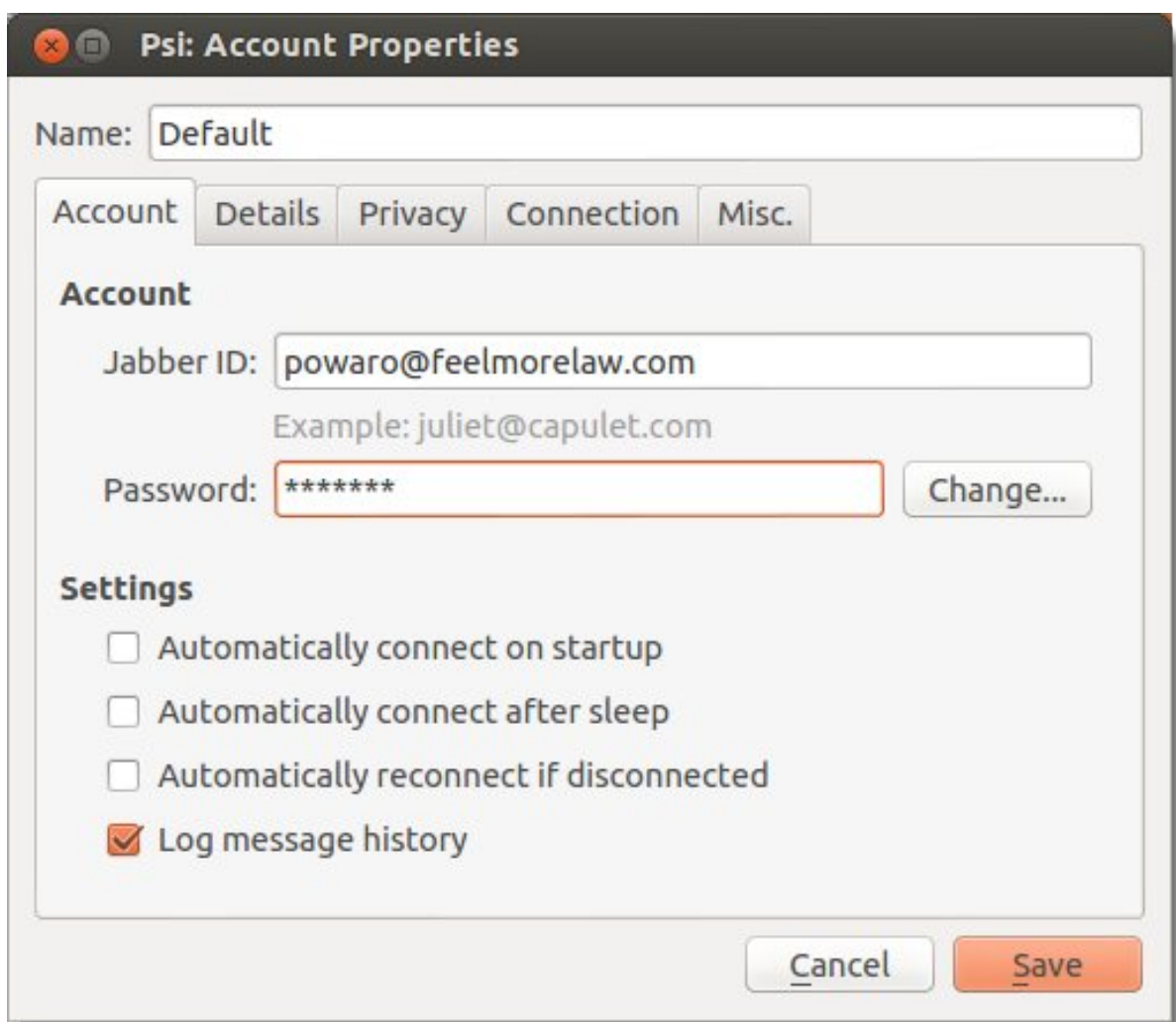
1. Go to Messages to **Preferences** → **Accounts**, and click the plus sign.
2. Fill in the information — protocol (**Jabber**), account name (you username including the domain) and password.
3. Save the account.

Use similar settings for iChat.



Configuring Psi on Linux

1. Download and install [Psi](#).
2. Run the application and click **General** → **Account Setup** → **Add**.
3. Fill in the information — XMPP address (your username including the domain) and password.
4. Save the account.



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

About group chat in instant messaging

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:

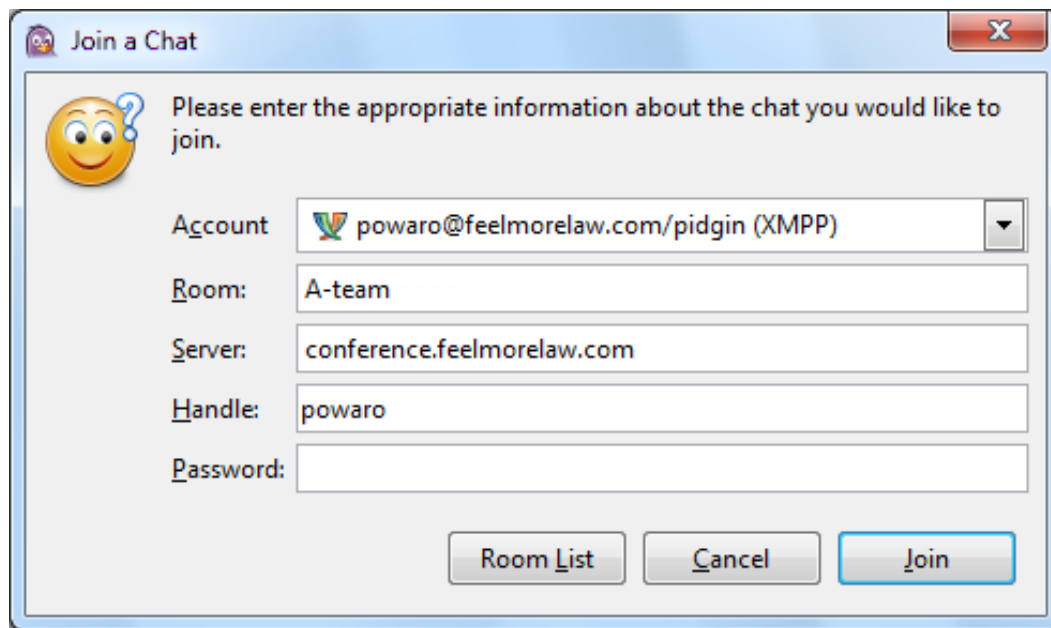
- [Pidgin for Microsoft Windows](#)
- [Messages for Mac OS X](#)
- [Psi for Linux](#)

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

Pidgin for Microsoft Windows

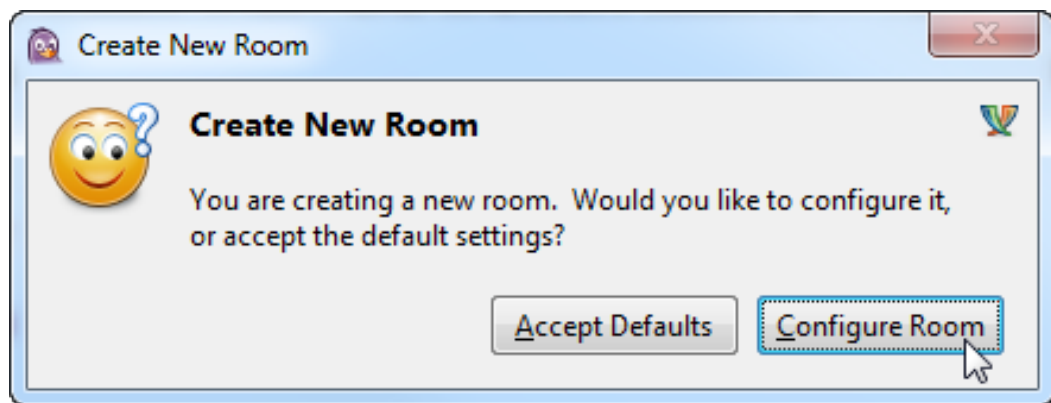
Initiating group chat in Pidgin

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.

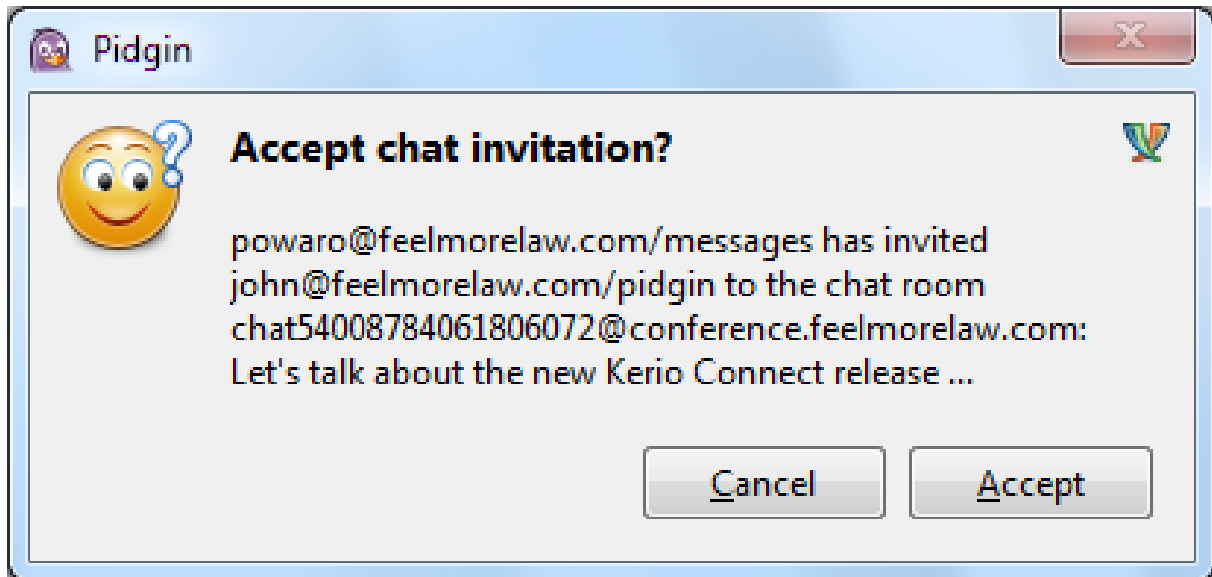
Inviting people to group chat in Pidgin

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

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.

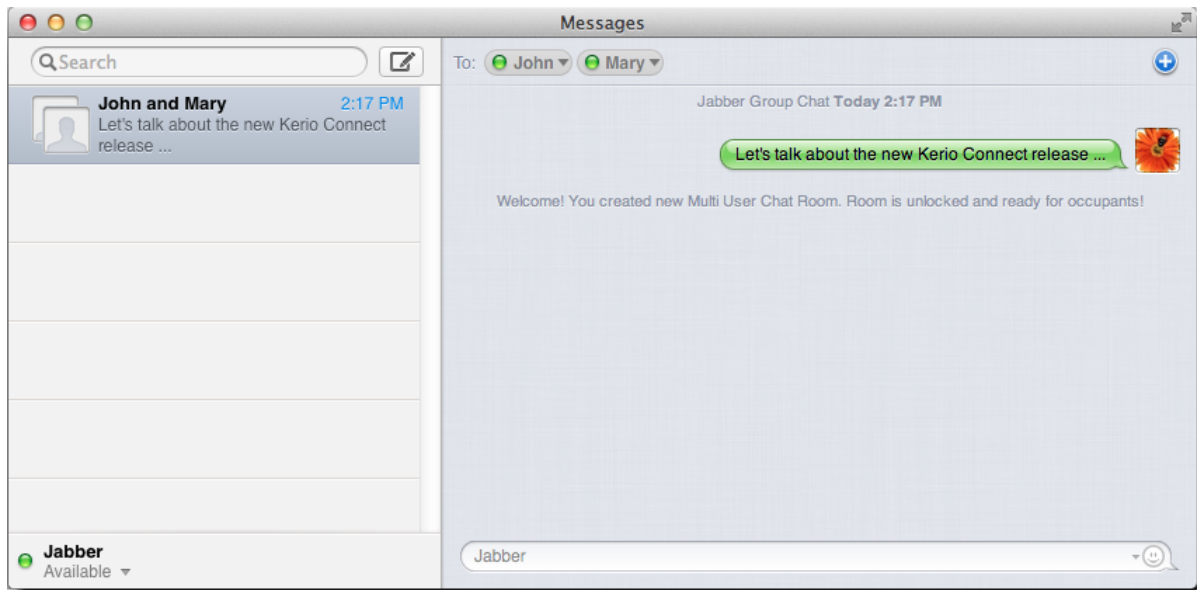
Messages for Mac OS X

Initiating group chats in Messages

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

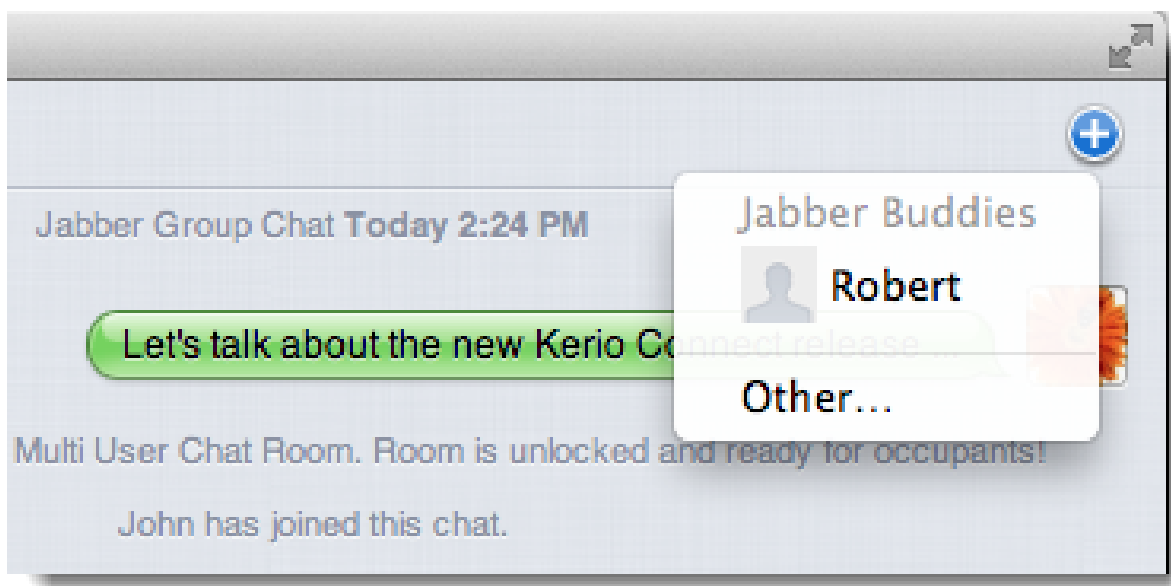
1. Initiate a conversation in **Messages**.
2. Add users to this conversation.

Users receive an invitation and you can start chatting.



Inviting people to group chats in Messages

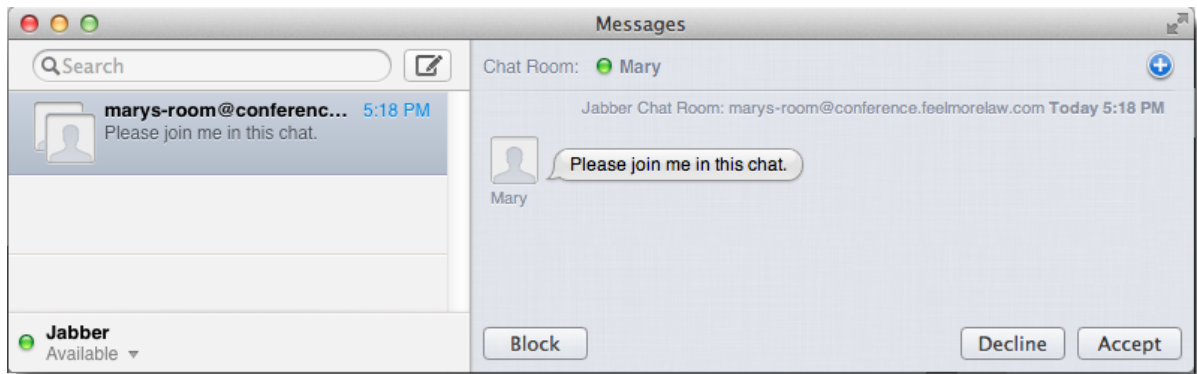
To invite people to a multi user chat room, click the blue plus icon and invite users.



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

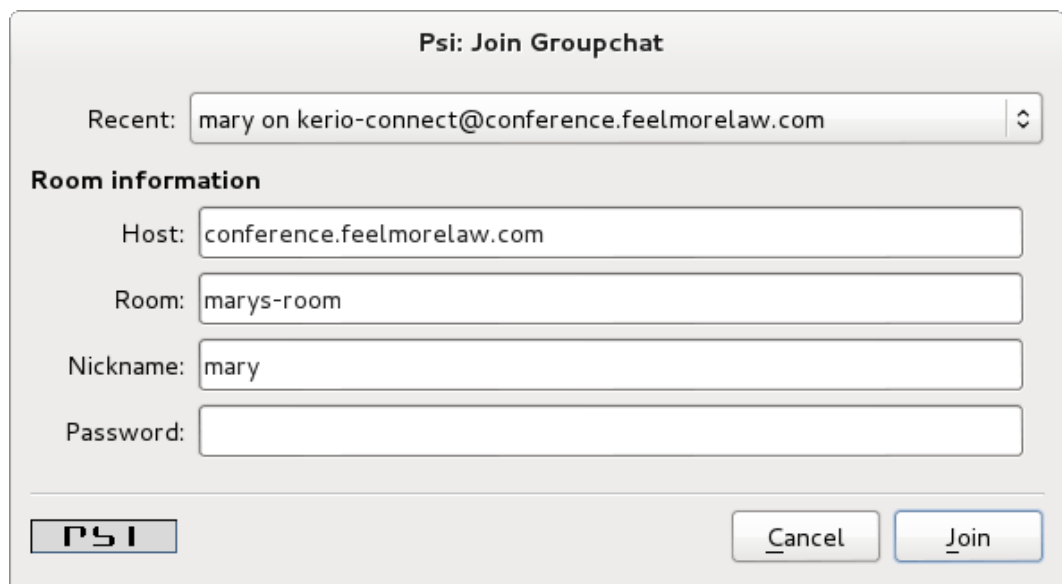


To leave a chat room, delete it from the list of chats.

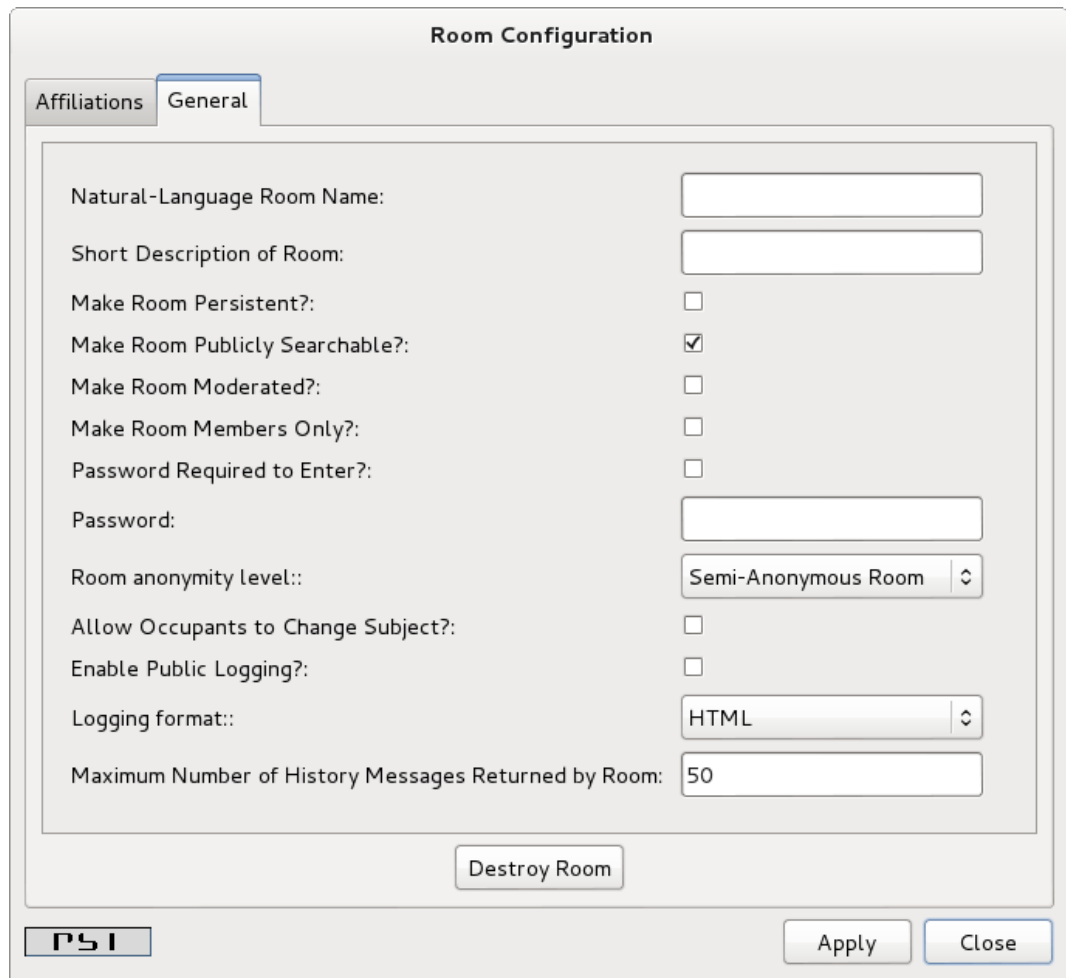
Psi for Linux

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 from the Psi application. It has two tabs: 'Affiliations' and 'General', with 'General' currently selected. The dialog contains several configuration options for a chat room:

- 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:: [Semi-Anonymous Room] (dropdown menu)
- Allow Occupants to Change Subject?: ☐
- Enable Public Logging?: ☐
- Logging format:: [HTML] (dropdown menu)
- Maximum Number of History Messages Returned by Room: [50] (text input field)

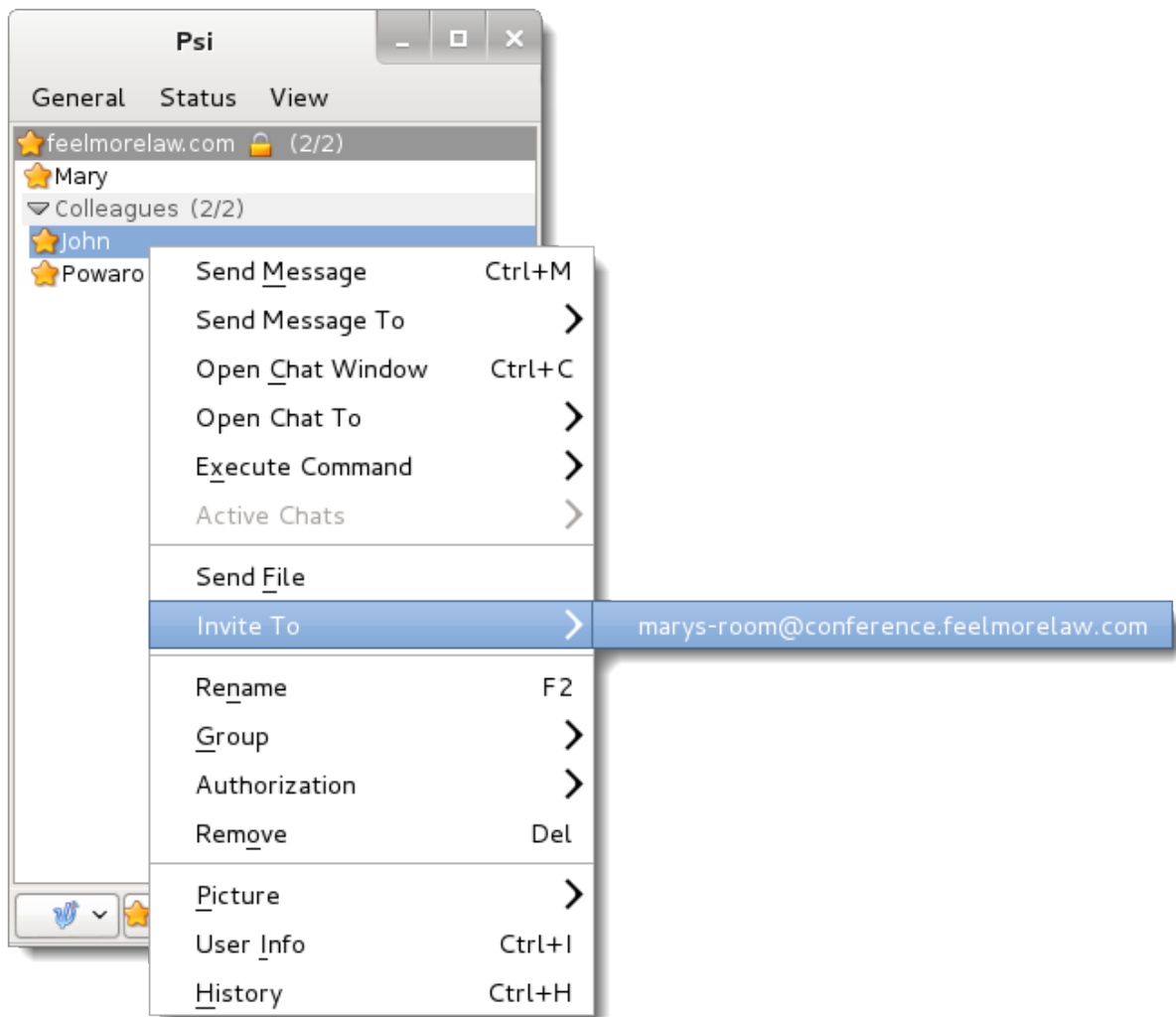
At the bottom of the dialog, there is a 'Destroy Room' button. Below the dialog box, the Psi logo is visible on the left, and 'Apply' and 'Close' buttons are on the right.

5. **Apply** the settings.

Inviting people to group chat in Psi

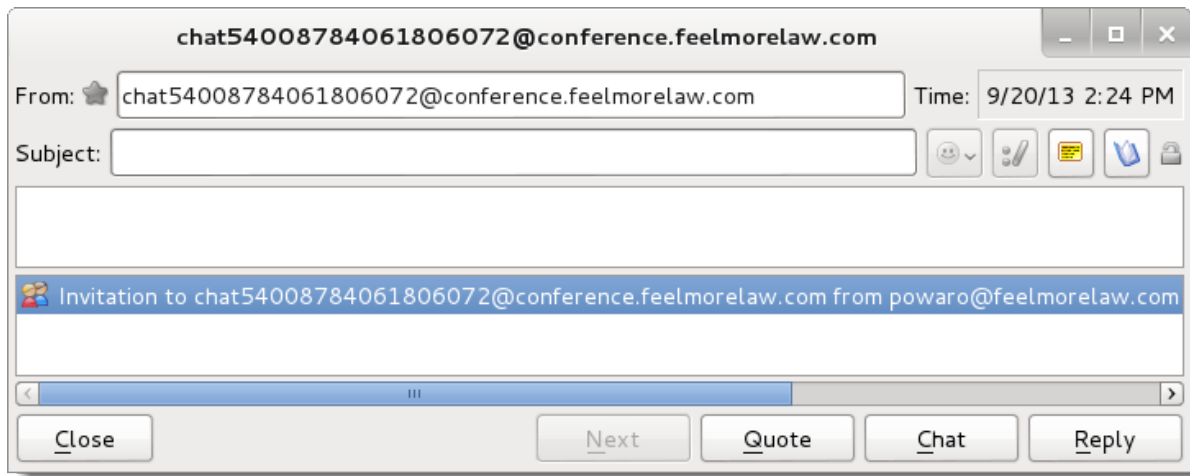
To invite people to a group chat, select a person in your contact list and click **Invite To**.

Initiating group chat in instant messaging



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

About Kerio Connect Account Assistant

Kerio Connect Account Assistant is a single autoconfig tool which enables one-time auto-configuration of the following applications:

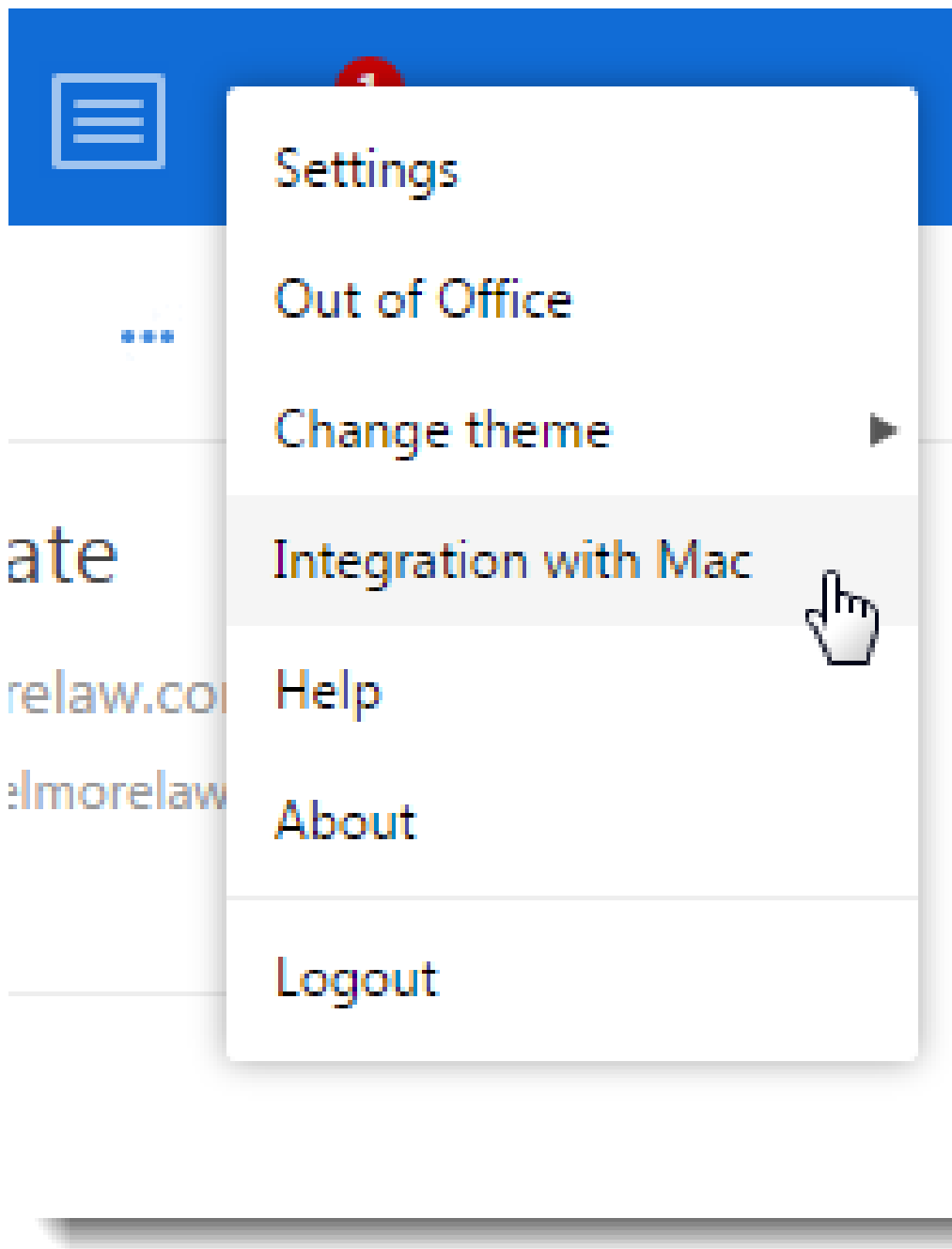
- Apple Mail & Notes (secure IMAP, SMTP Submission)
- Apple Calendar & Reminders (CalDAV)
- Apple Contacts (CardDAV)
- Apple Messages (XMPP)
- Microsoft Outlook for Mac (Exchange Web Services)
- Microsoft Entourage (WebDAV)

Using Kerio Connect Account Assistant

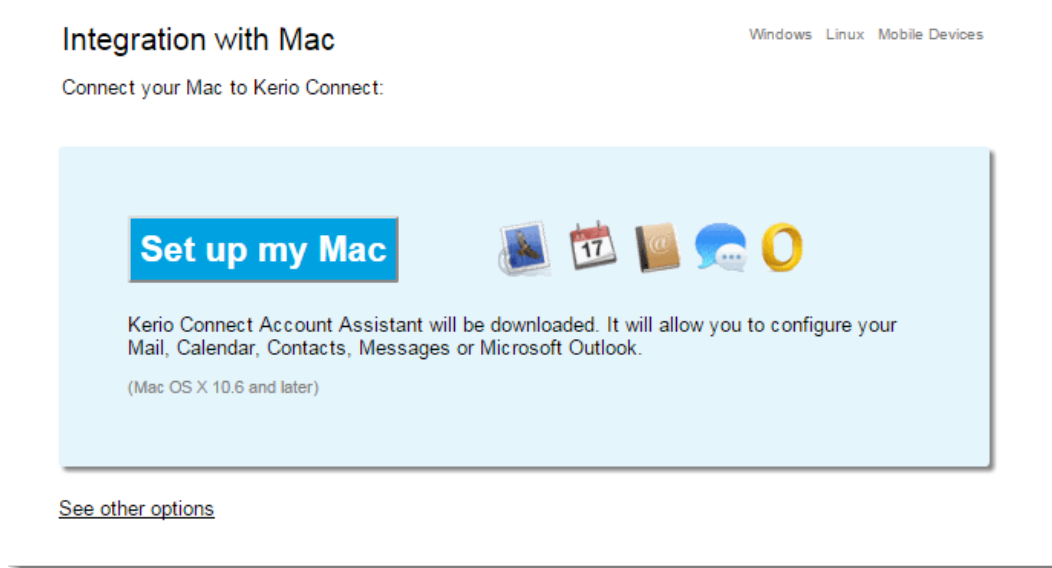
Kerio Connect Account Assistant is unique for each user. Download it from your own integration page.

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

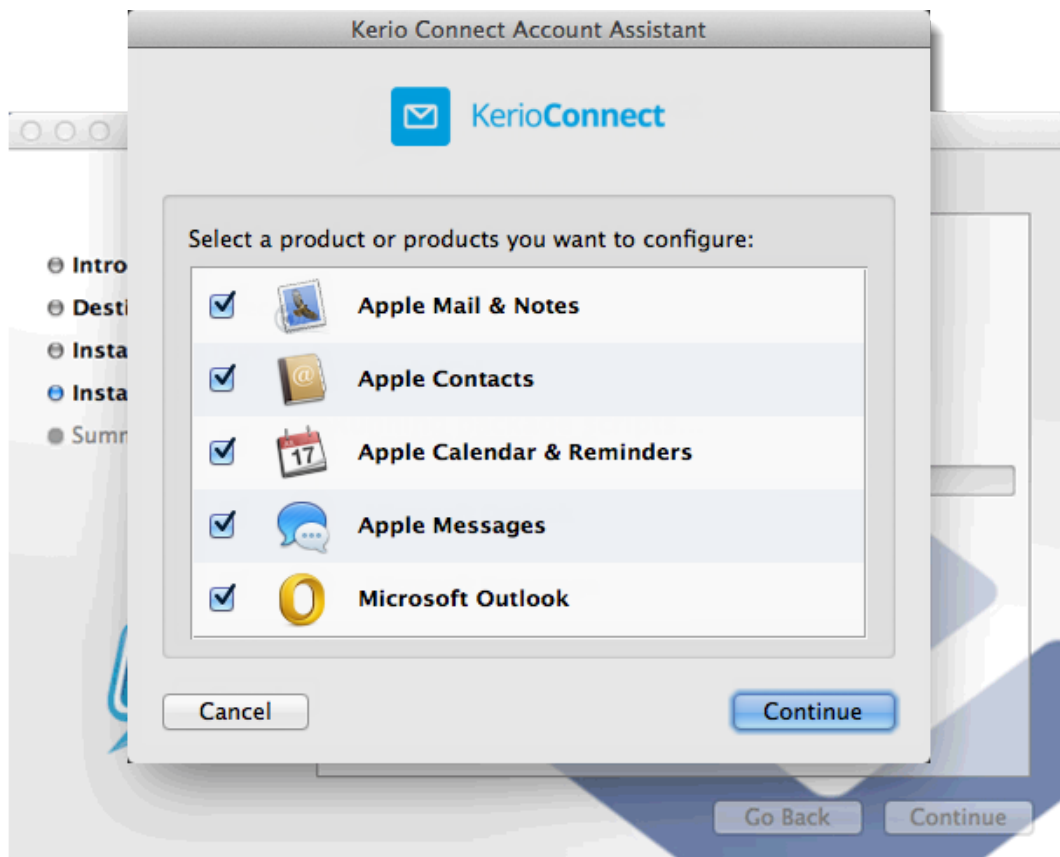
You can also click your name in Kerio Connect Client and select **Integration with Mac**.



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



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 click **Continue**.



5. Enter your Kerio Connect Client password and click **Continue**.

Now the configuration application verifies your identity and server connection.

6. Click **Configure** to run the 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*.

Troubleshooting

Public contacts lost after upgrading to OS X 10.11 El Capitan

Due to the changes in the Contacts application in OS X 10.11 El Capitan, users lose their public contacts after upgrading their system to El Capitan. To get their public contacts back, they must download and install Kerio Connect Account Assistant version 8.5.3 or newer.

Kerio Connect accounts deleted on OS X 10.11 El Capitan

Due to the changes in the Contacts application in OS X 10.11 El Capitan, all CardDAV accounts created by Kerio Connect Account Assistant are deleted if you synchronize your Keychain with iCloud.

Switch off the synchronization of Keychain and run the Kerio Connect Account Assistant to configure the applications again.

Configuring a Microsoft Exchange Internet account on Mac OS X

Overview

With Kerio Connect 8.3 and later, you can configure the Exchange (EWS) type of Internet Accounts on Mac OS X 10.9 and later. The support for EWS Internet Account includes Apple Mail & Notes, Calendar & Reminders, and Contacts.



You can also use [Kerio Connect Account Assistant](#) to configure these applications using alternative account types that offer additional functionality.

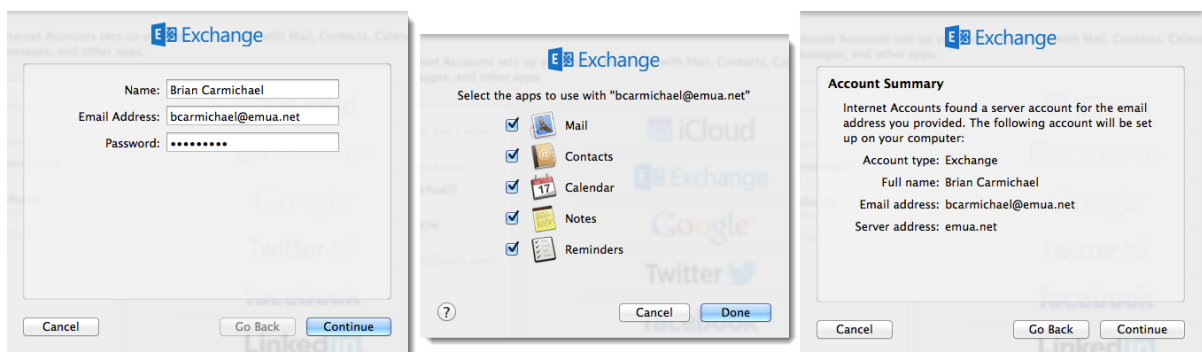
Enabling automatic discovery

You can configure your DNS to support the Autodiscover feature. With autodiscovery, users can use only their username and password to create an account.

For detailed information about the settings, read [Configuring Autodiscover in Kerio Connect](#).

Adding an Exchange Internet account

1. In **System Preferences**, select **Internet Accounts**.
2. In the right window pane, select **Exchange**.
3. Type your email address and password.
4. Verify the information and click **Continue**.
5. Select the applications you want to configure and click **Done**.



Exchange account limitations

- Public and shared folders are not synchronized in Mail. You can use [IMAP](#) or [Kerio Connect Client](#).
- Public and shared calendars (without Delegation) are not synchronized in Calendar. You can use [CalDAV](#) or [Kerio Connect Client](#).
- Public and shared contacts are not synchronized in Contacts. The Global Address List can be queried. You can use [CardDAV](#) or [Kerio Connect Client](#).
- You cannot move or create folders within specially designated folders (e.g Inbox, Drafts, Sent, Trash, Junk)
- Only one reminder can be synchronized with an event.

Creating Exchange ActiveSync accounts in Microsoft Outlook

Overview



New in Kerio Connect 8.5!

You can synchronize your account with Microsoft Outlook 2013 and Outlook 2016 via Exchange ActiveSync.

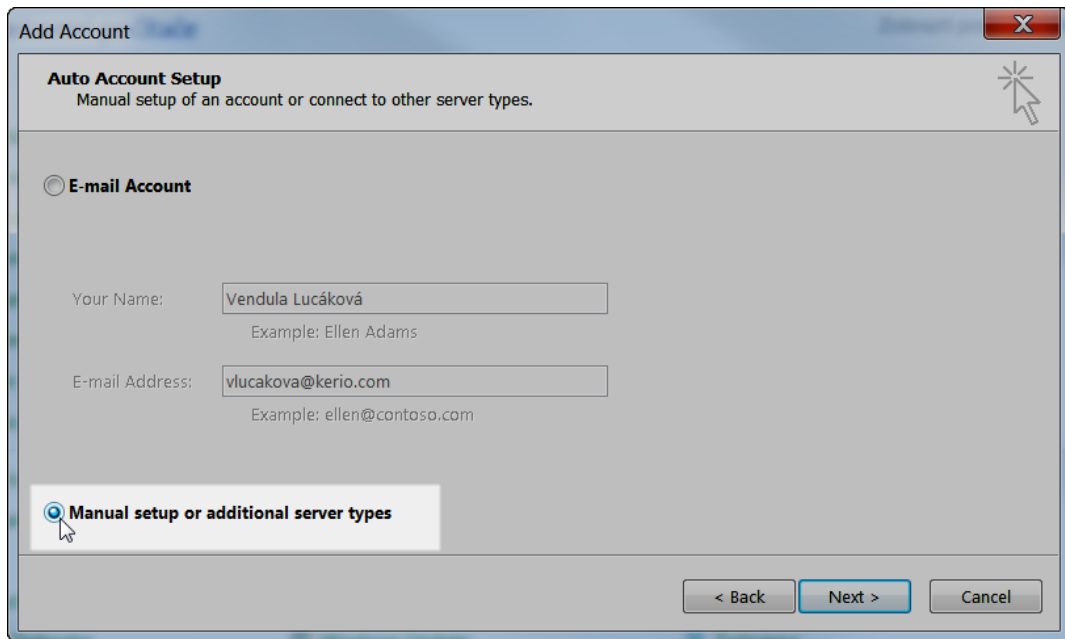
Due to the implementation of the Exchange ActiveSync protocol in Outlook, there are the following usage limitations:

- You cannot synchronize your email filters from Kerio Connect Client.
- You cannot create additional contact, calendar, or task folders.
- Global Address List does not synchronize to Outlook.
- You cannot share any folders.
- You cannot see contact groups created in Kerio Connect Client.
- You cannot rename or delete calendar and task folders created in Kerio Connect Client.
- You cannot synchronize your drafts and notes, or task status.
- Delivery and read receipts do not work.
- You cannot set the out-of-office message.

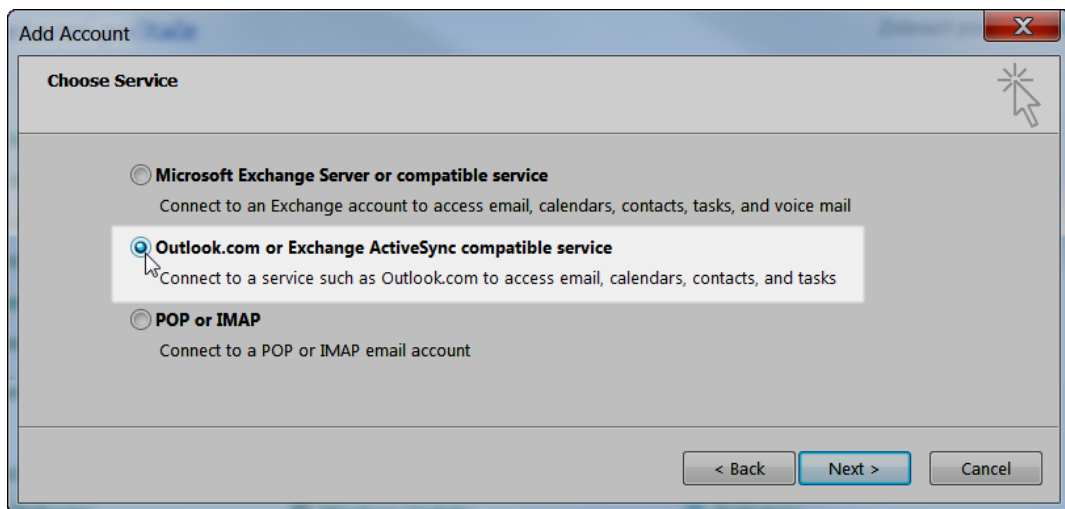
Creating an Exchange ActiveSync profile

To create a profile for Exchange ActiveSync in Outlook:

1. Go to **Windows Control Panel** → **Mail** and click **Show Profiles**.
2. Click **Add**, enter a name for the profile, and confirm.
3. Select **Manual setup or additional server types**, and click **Next**.



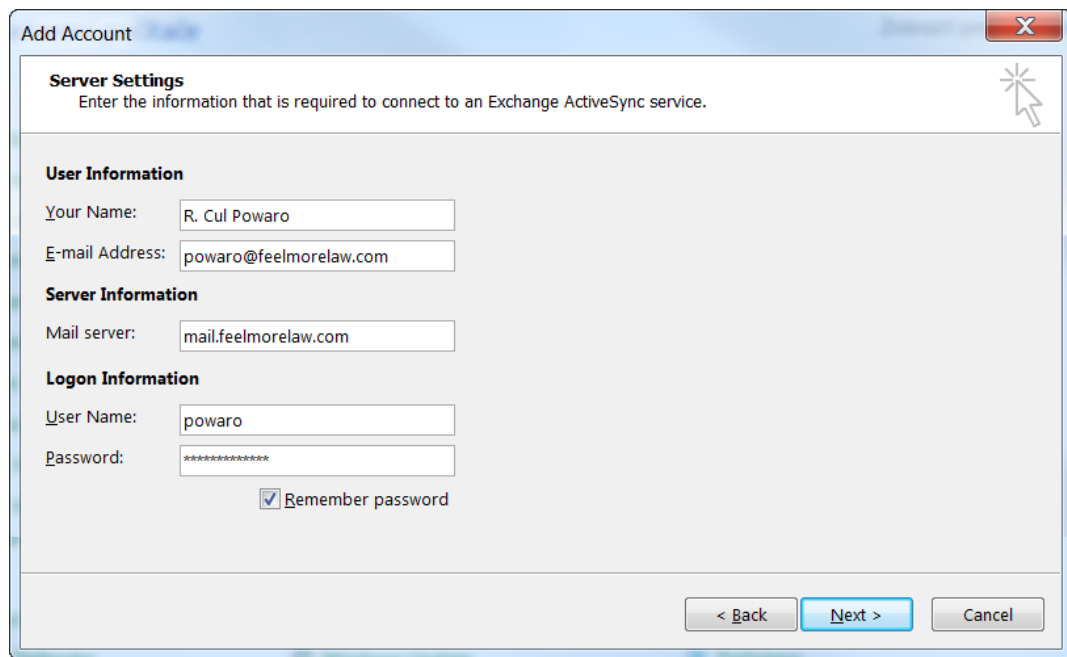
4. Select **Outlook.com or Exchange ActiveSync compatible service**, and click **Next**.



5. Type the user, server, and login information, and click **Next**.

If the user is not from a primary domain, the username must include the domain (for example, jsmith@company.com).

Creating Exchange ActiveSync accounts in Microsoft Outlook

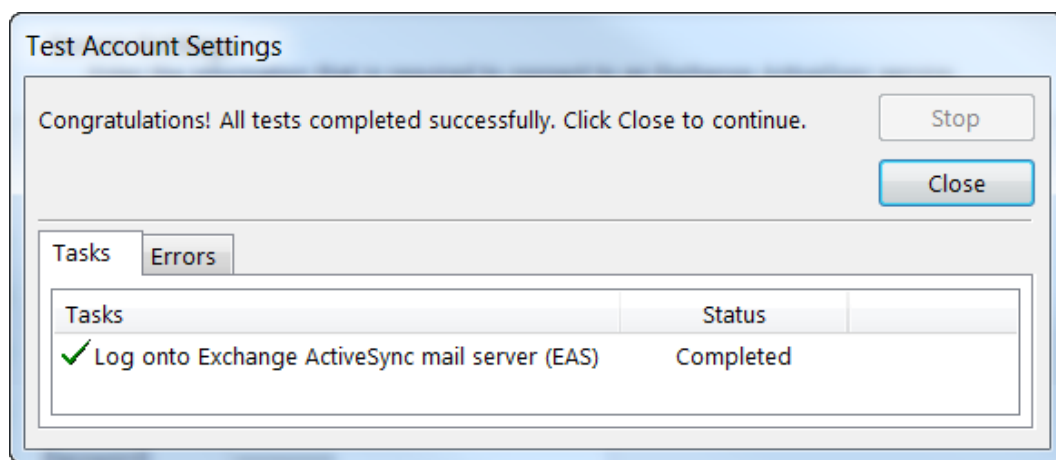


The 'Add Account' dialog box is shown with the 'Server Settings' tab selected. It contains the following fields and options:

- Server Settings:** Enter the information that is required to connect to an Exchange ActiveSync service.
- User Information:**
 - Your Name: R. Cul Powaro
 - E-mail Address: powaro@feelmorrelaw.com
- Server Information:**
 - Mail server: mail.feelmorrelaw.com
- Logon Information:**
 - User Name: powaro
 - Password: [masked]
 - ☒ Remember password

Buttons at the bottom: < Back, Next >, Cancel.

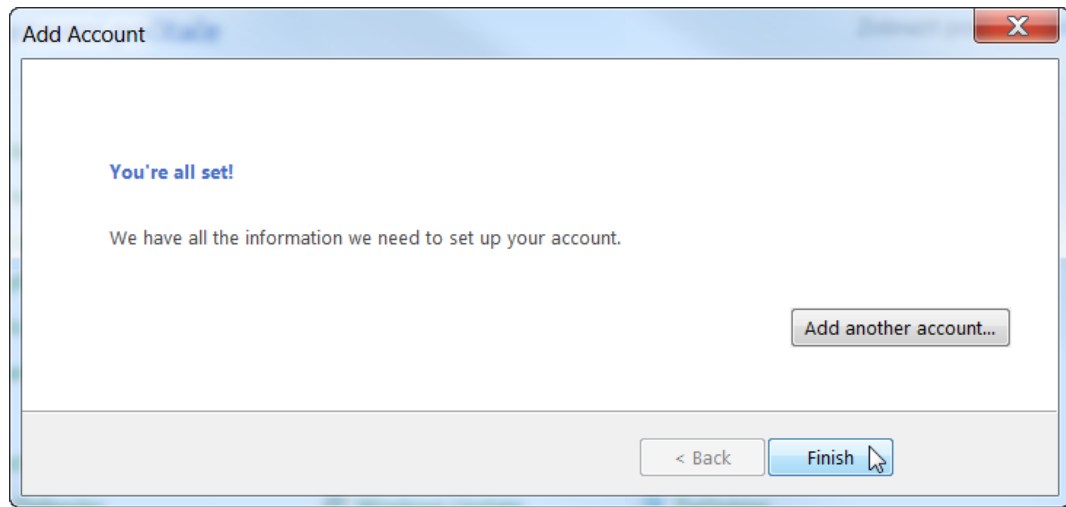
- When Outlook completes the test connection, click **Close**.



The 'Test Account Settings' dialog box shows the results of the connection test. It includes a 'Stop' button and a 'Close' button. Below these are tabs for 'Tasks' and 'Errors'. The 'Tasks' tab is selected, showing a table with the following data:

Tasks	Status
✓ Log onto Exchange ActiveSync mail server (EAS)	Completed

- Click **Finish**.

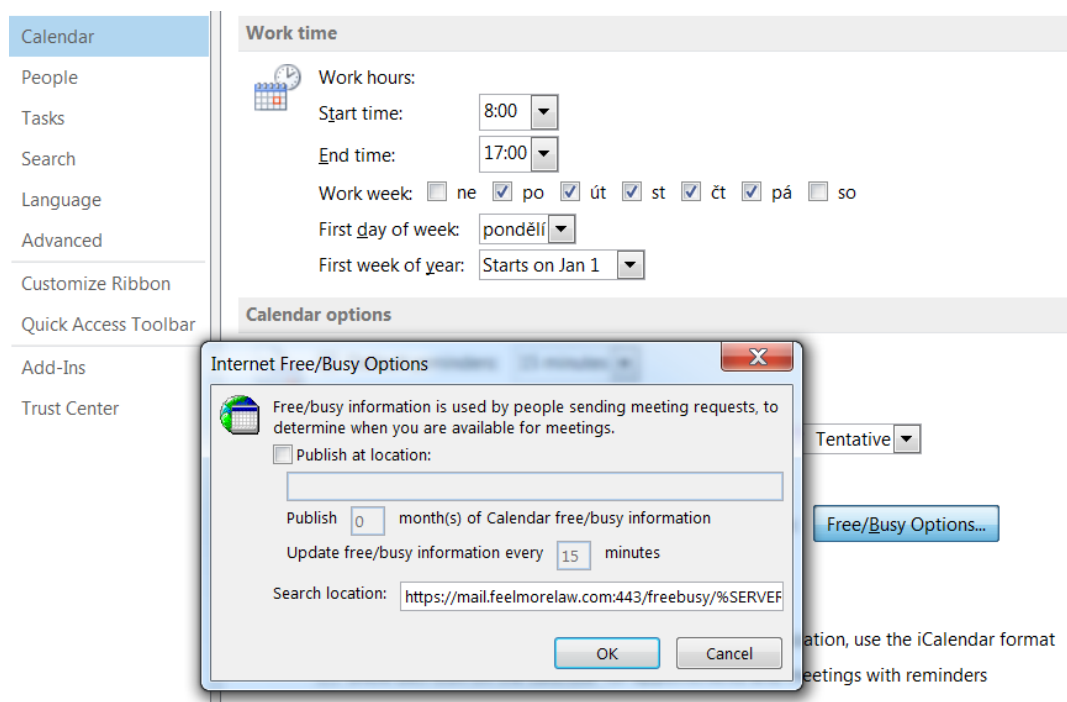


Accessing the free/busy information

To see your the free/busy availability information of invitees, configure the free/busy URL in Microsoft Outlook:

1. In Outlook, go to **File** → **Options** → **Calendar** → **Free/Busy Options**.
2. Type your calendar address in the **Search location** field in the following format:
`https://<_server_address>/freebusy/%SERVER%/NAME%`
Example: `https://mail.feelmorelaw.com:443/freebusy/%SERVER%/NAME%`
3. Save your settings.

Creating Exchange ActiveSync accounts in Microsoft Outlook



Now you can see the Free/Busy information for all users when creating meetings.

Configuring Mail and Calendar on Microsoft Windows

Overview

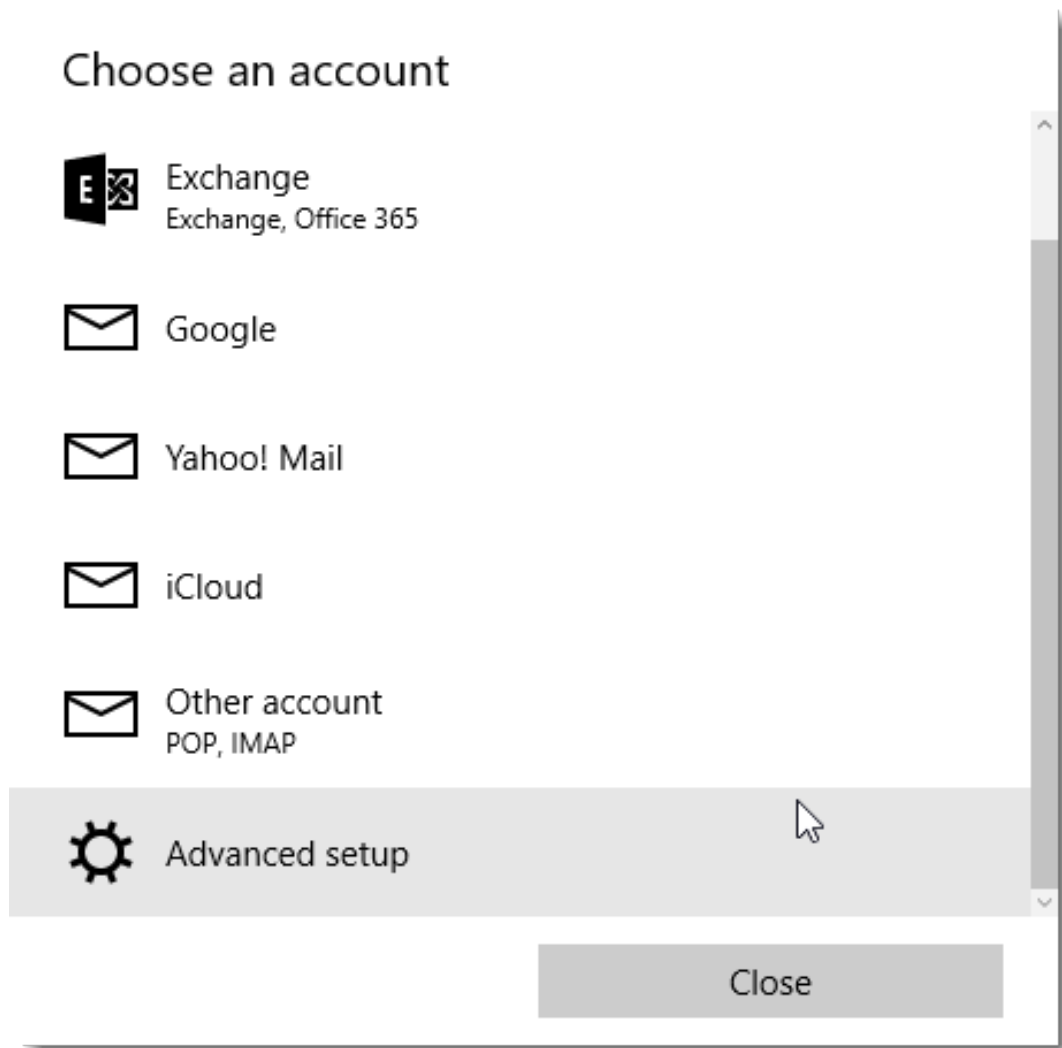


New in Kerio Connect 8.5.2!

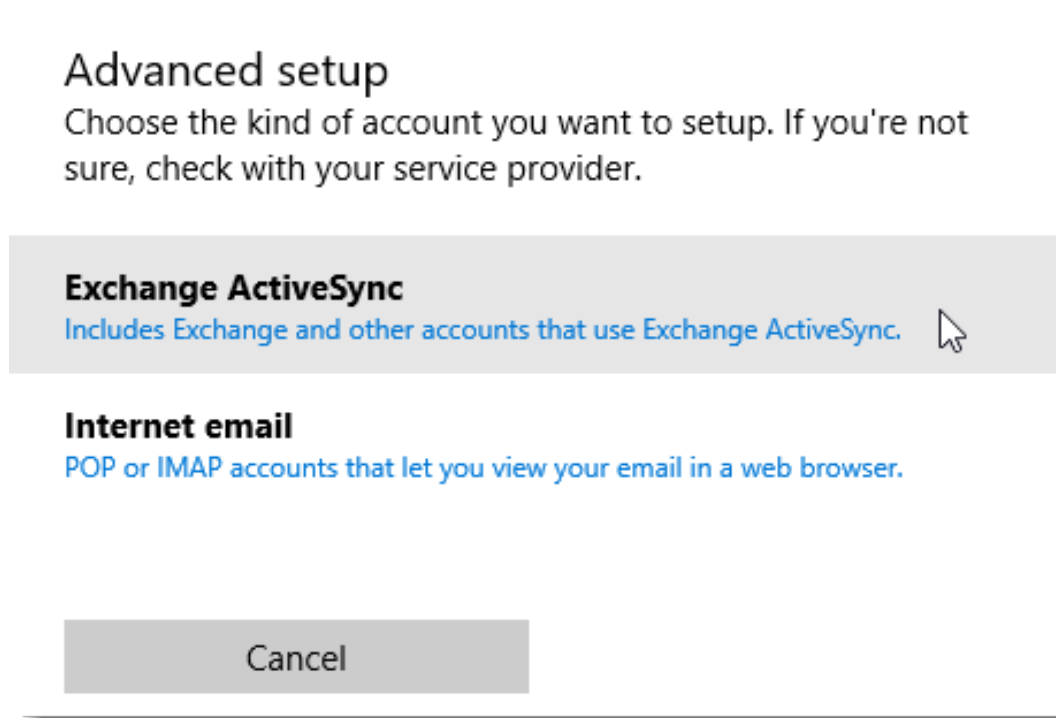
You can synchronize your account with the **Mail** and **Calendar** applications on **Microsoft Windows** via Exchange ActiveSync.

Creating accounts

1. Go to the **Mail** or **Calendar** application and switch to **Settings**.
2. Click **Accounts** → **Add account**.
3. In the **Choose an account** dialog box, select **Advanced setup**.



4. Select **Exchange ActiveSync**.



5. Type the email address and password, user name, domain and server, and click **Sign-in**.

Exchange

Email address

powaro@feelmorrelaw.com

Password

••••••••••

User name

powaro

Domain

feelmorrelaw.com

Server

mail.feelmorrelaw.com

☒ Server requires encrypted (SSL) connection

Account name

Powaro's account

Cancel Sign-in

6. When the application finishes the configuration, click **Done**.

All done!

Your account was set up successfully.

 powaro@feelmorrelaw.com

Done



You can start using the Mail and Calendar application on your Microsoft Windows 10 machine.

Support for Apple iCal/Calendar using the CalDAV standard

About CalDAV and Apple iCal/Calendar

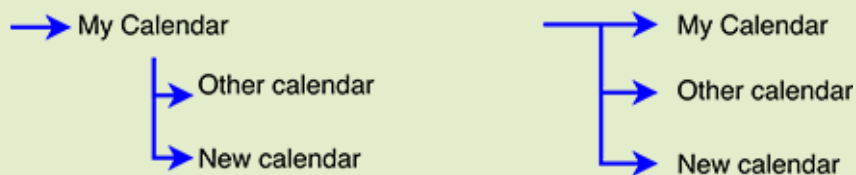
CalDAV is an Internet standard which allows applications such as Apple iCal and Apple Calendar to manage calendaring information on a remote server (Kerio Connect).

Kerio Connect supports the following CalDAV features:

- Calendar availability (free/busy information)
- Events with privacy tag
- Travel time for events
- Scheduling (invitation requests)
- Per-folder sharing (without delegation)
- Older sharing notifications
- Full delegation support
- Custom labels for shared calendars



The CalDAV standard does not support synchronization of nested calendars. To synchronize all your calendars, they must be at the same level.



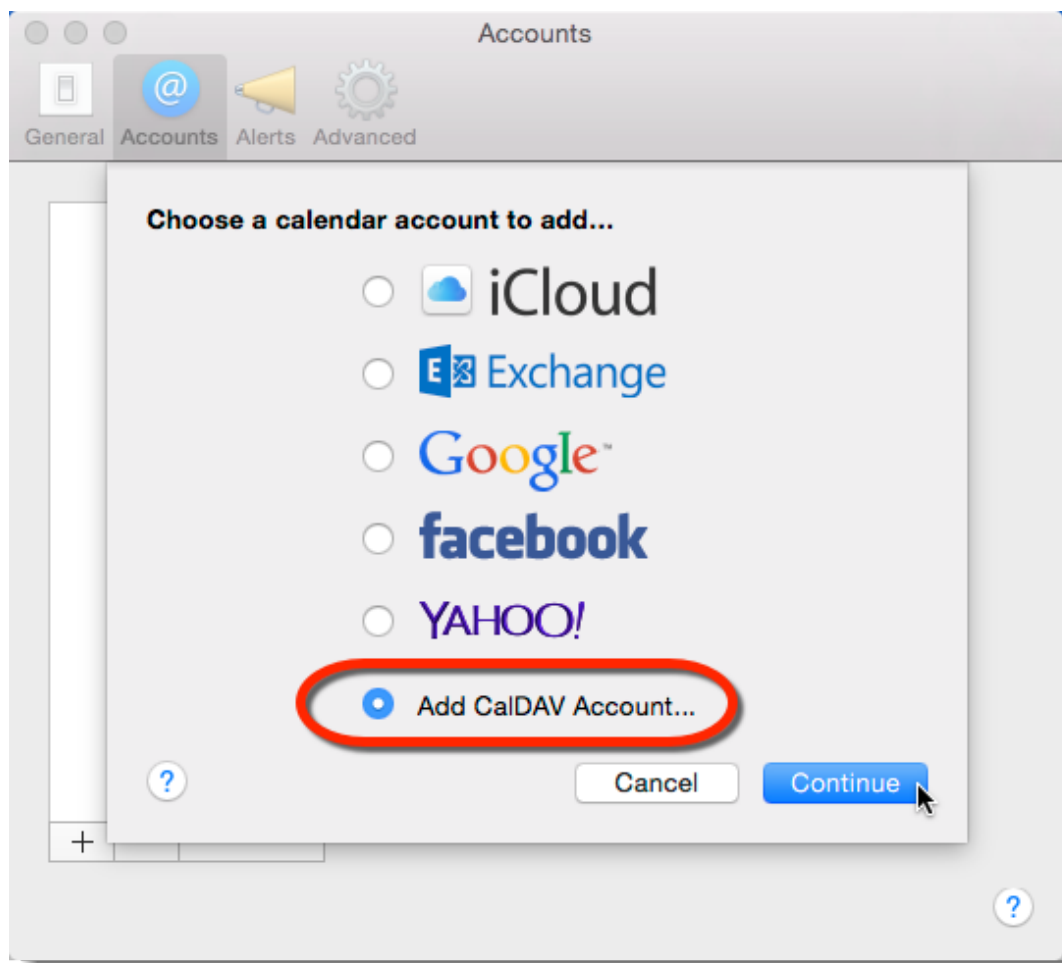
Configuring CalDAV account

Automatic configuration

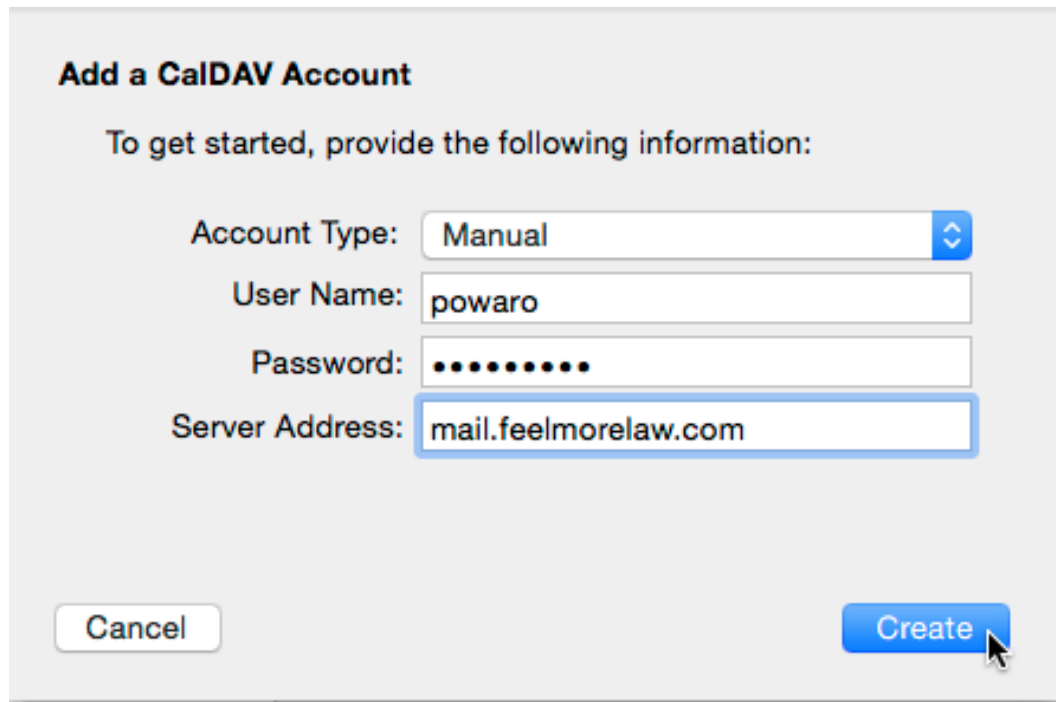
Use [Kerio Connect Account Assistant](#) to automatically configure Apple iCal/Calendar accounts on Mac OS X 10.6 or later.

Manual configuration

1. Run the *Apple iCal/Calendar* application.
2. In the menu, select **iCal/Calendar**→ **Preferences** and go to the **Accounts** tab.
3. Click the + button to create a new account.
4. Select **Add CalDAV Account** and click **Continue**.



5. Select **Manual**, and type your credentials and the location of your Kerio Connect server.



The screenshot shows a dialog box titled "Add a CalDAV Account". Below the title, it says "To get started, provide the following information:". There are four input fields: "Account Type" with a dropdown menu showing "Manual", "User Name" with the text "powaro", "Password" with masked dots, and "Server Address" with the text "mail.feelmorelaw.com". At the bottom left is a "Cancel" button, and at the bottom right is a "Create" button with a mouse cursor hovering over it.

6. Click **Create**.

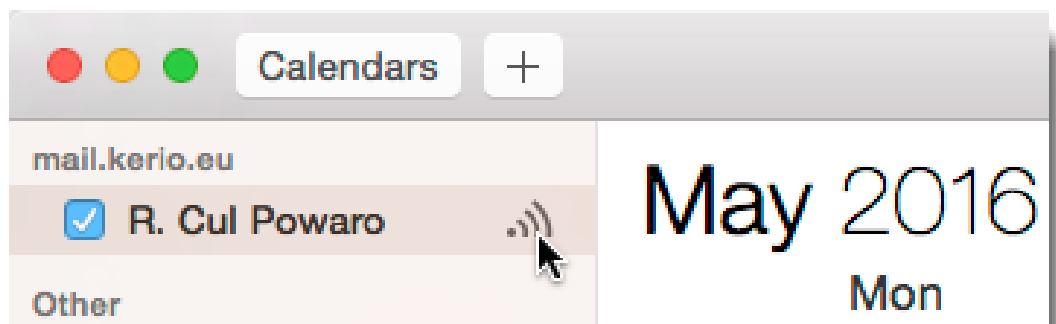
Sharing calendars

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.

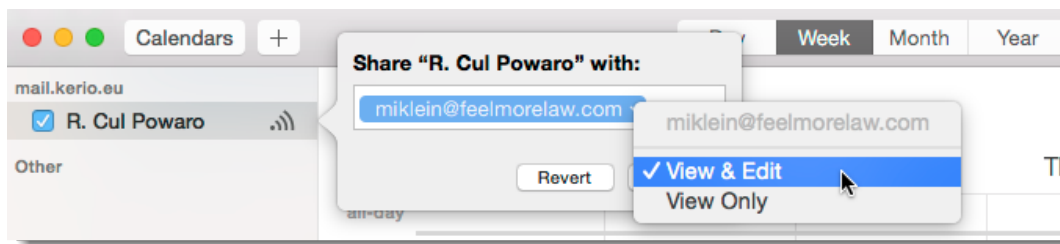
To share a calendar:

1. Select the calendar you want to share from the list of your calendars.
2. Click the share icon next to the calendar name.



3. Type the email address of the user, you want to share the calendar with.
4. To assign rights to the calendar, click the arrow next to the email address and select the level of rights.

You can set sharing to **View only** or **View & Edit**.



5. Click **Done**.

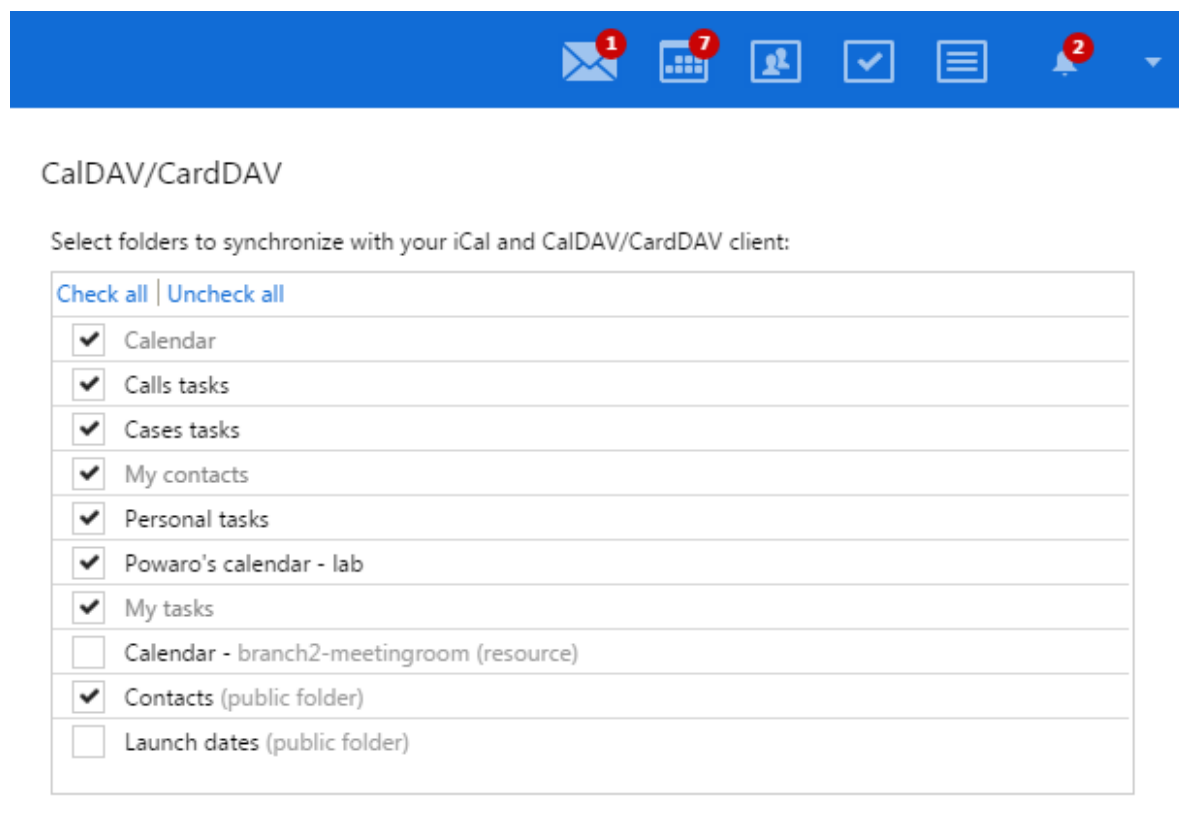
Adding shared, public or resource calendar

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

Accept the invitation and the calendar is added to your calendar list.



If you decline the invitation (or do not receive one), [subscribe to the calendar](#) in your Kerio Connect Client and [select it for synchronization](#).



When user adds a shared calendar, they can apply custom properties (for example, colors, names, description) which does not affect the properties of the calendar owner. This behavior is contrary to Delegation, where any calendar property changes performed by the delegate directly affects the owner's calendar.

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. Select the **Edit** button to add a delegate.

Receiving immediate updates

In Kerio Connect 8.5 and newer, you receive updates immediately through the push notification service.



If a secure connection to the notification server is unavailable, users receive updates later.

Configuring Microsoft Windows 8 Mail using Exchange ActiveSync

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.



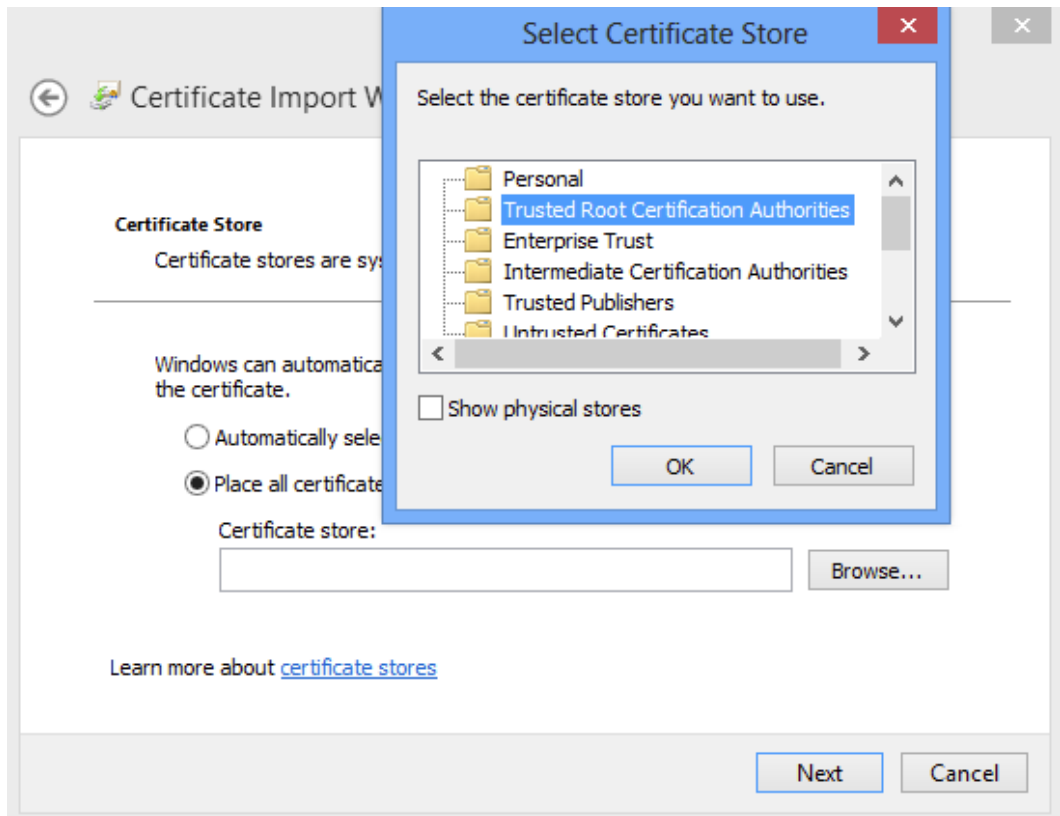
Mobile Devices



[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 of 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

You can synchronize your Kerio Connect account with various mobile devices.

Read the following articles with detailed information:

- [Kerio Connect Sync app for Android devices](#)
- [Synchronizing your iPhone with Kerio Connect](#)
- [Configuring an Exchange ActiveSync account on Android devices](#)
- [Configuring Microsoft Windows Phone 8 using Exchange ActiveSync](#)
- [Configuring IMAP, CardDAV, and CalDAV on Android based devices](#)
- [Manual Configuration of CalDAV and CardDAV accounts](#)

Configuring Microsoft Windows Phone 8 using Exchange ActiveSync

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).

Which data can be synchronized

For detailed information about which data can be synchronized to your mobile device, see the [product pages](#).

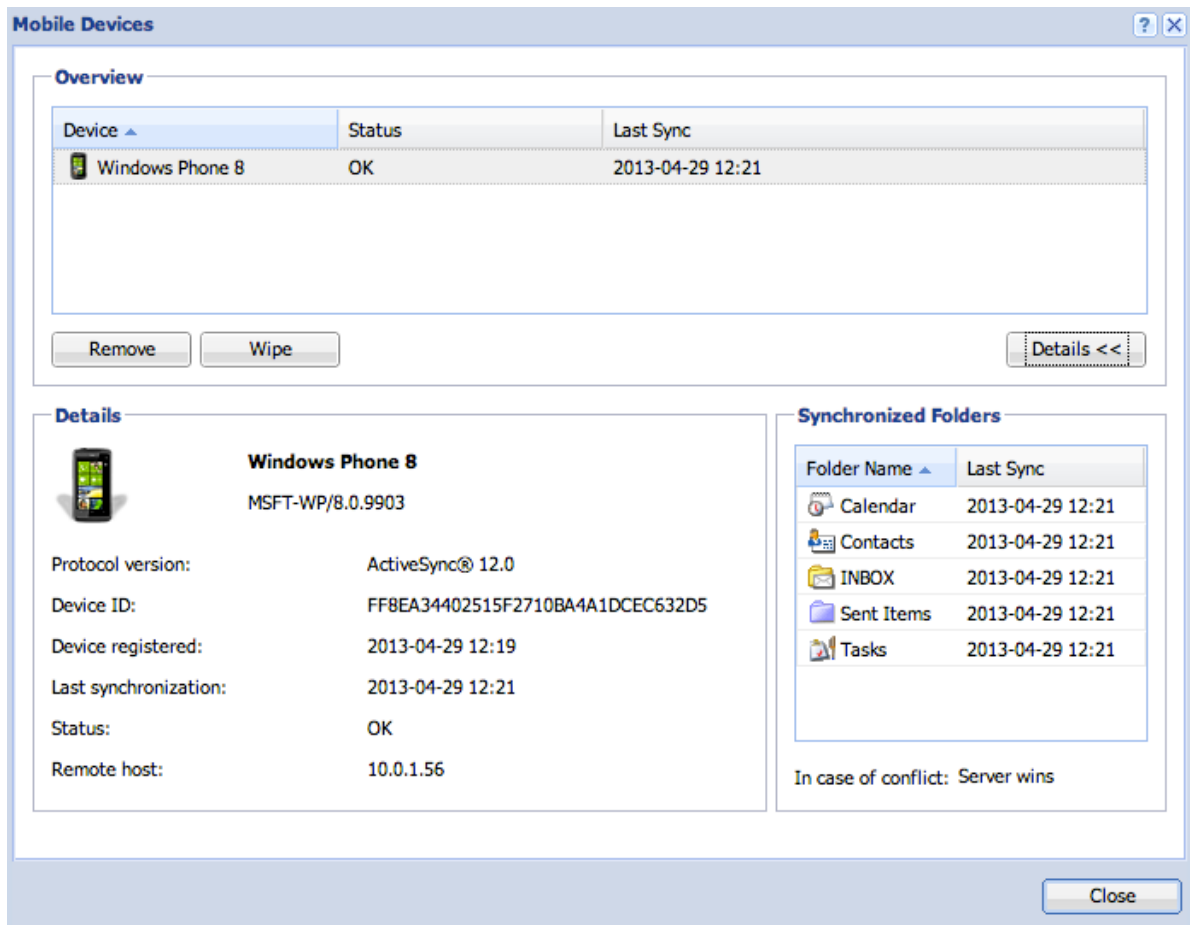
Configuring Kerio Connect

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

Check the following items:

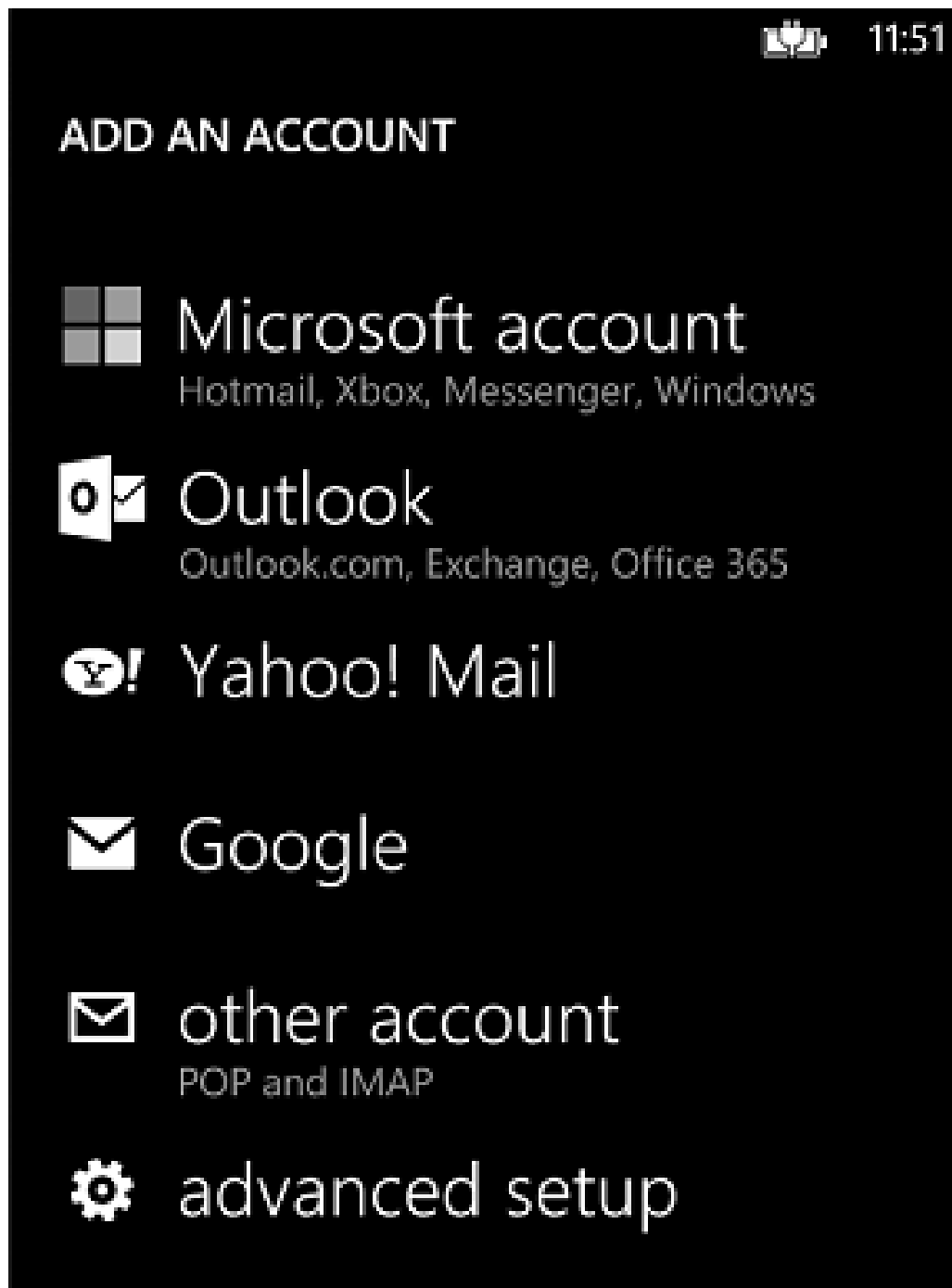
- Exchange ActiveSync add-on in Kerio Connect
- HTTPS service running and port 443 open on your firewall

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**.

10:51

ADVANCED SETUP

Email address

sandy@feelmorelaw.com

Password

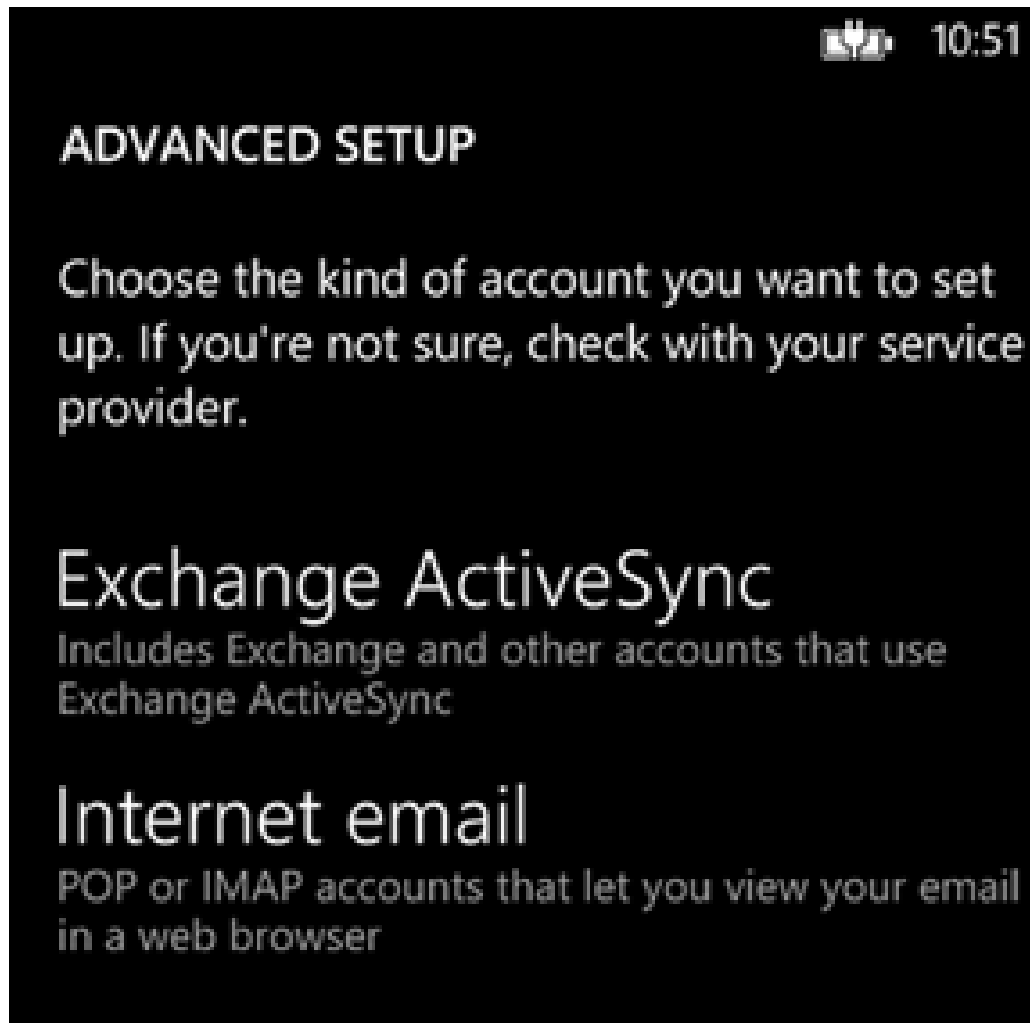
.....

☐ Show password

Your sign-in information will be saved.
If you're adding a business Exchange
account, your network administrator will
be able to remotely delete your content
and settings from your phone.

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`).

10:52

EXCHANGE ACTIVESYNC

sandy@feelmorelaw.com

Password

.....

☐ Show password

User name

sandy

Domain

feelmorelaw.com ?

Server

mail.feelmorelaw.com ?

sign in

7. Click **Sign in**.

Now you can synchronize your Windows Phone 8 device with your account.



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](#).



If you synchronize your Kerio Connect account with an Exchange ActiveSync device, the following applies due to the limitation of the Exchange ActiveSync protocol:

- Only the first three email addresses synchronize.
- The email address types don't synchronize (for example, work email, or home email).

Delegation in Microsoft Outlook 2011

About delegation

Delegation is an advanced type of sharing. A **delegate** can act on your behalf. A **delegate** can act on your behalf — they can send/confirm your event invitations, and/or send/receive your messages.

Delegating users

In Outlook 2011, delegates must have at least **Editor** rights to act on your behalf.

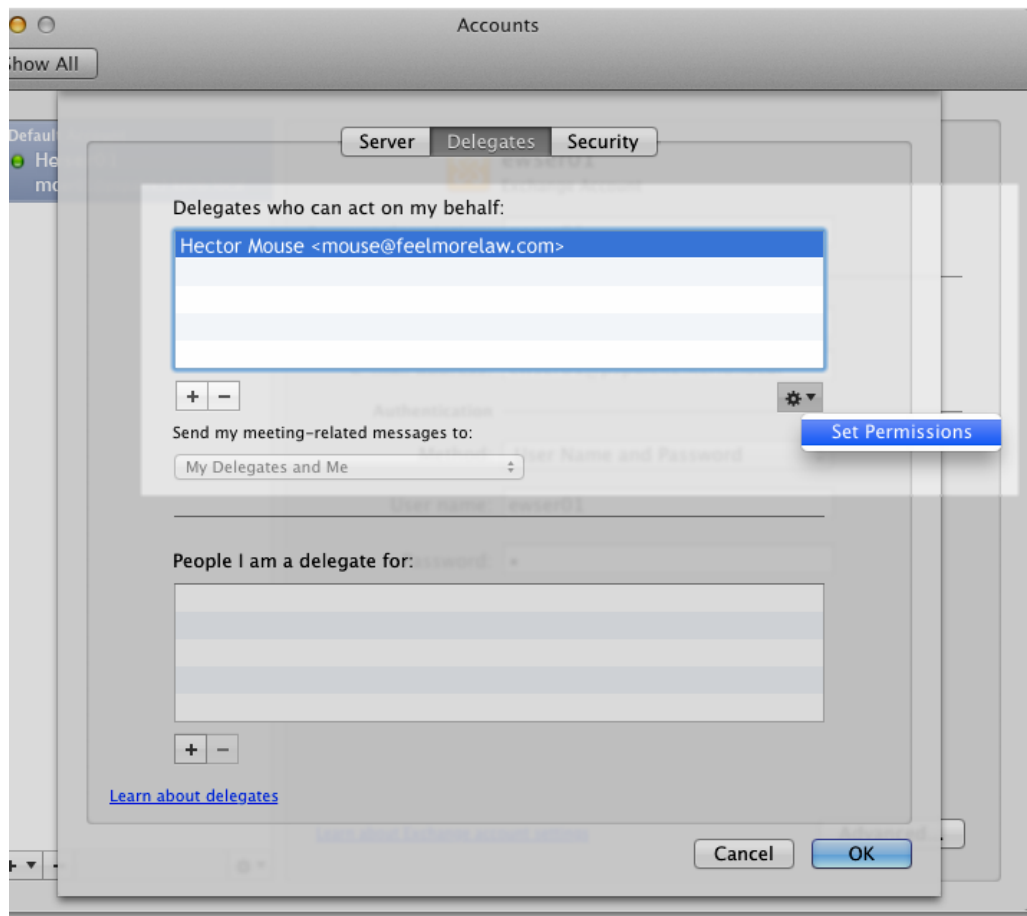
With a lower level of rights, you receive the following error message:



Assigning rights to delegates

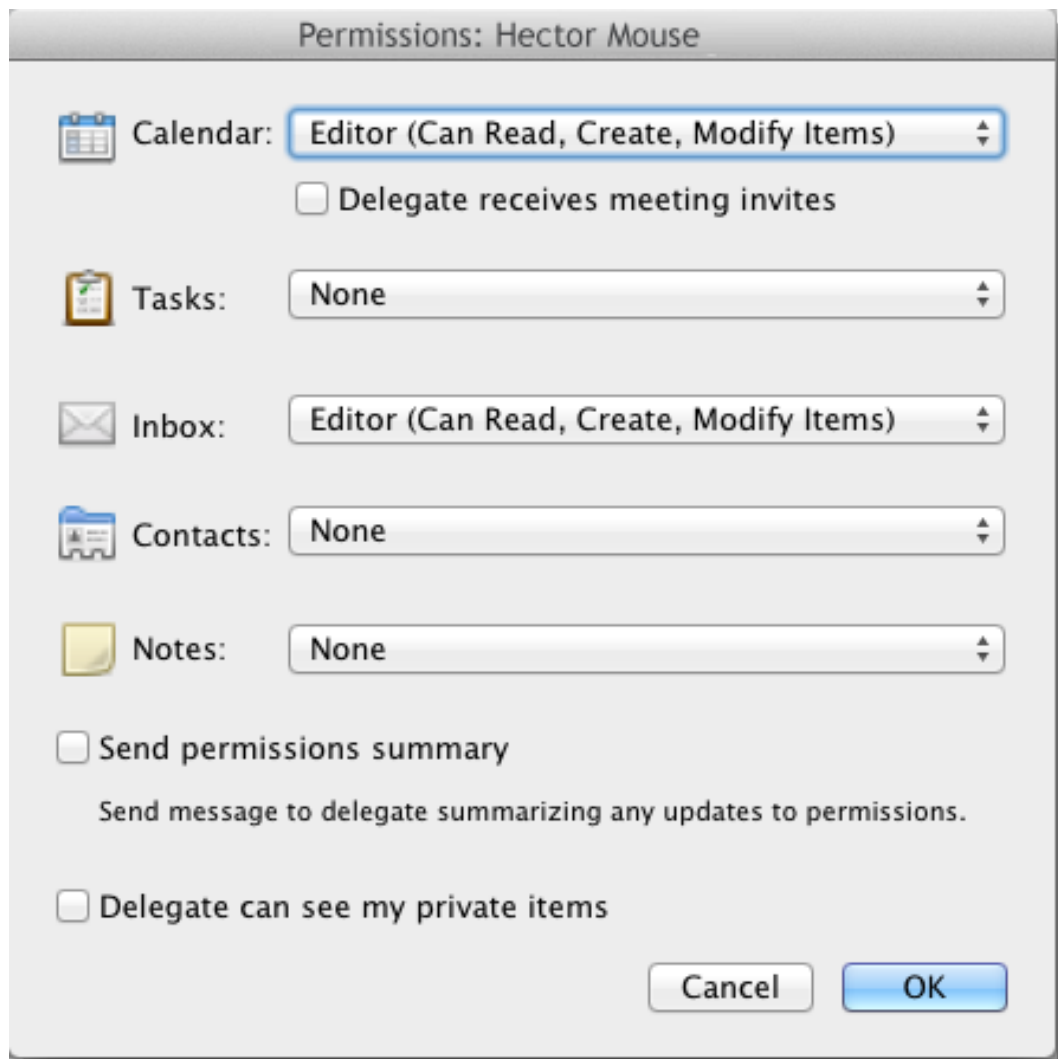
1. In your account settings, go to section **Delegates**.
2. Select a delegate and click **Set Permissions**.

Delegation in Microsoft Outlook 2011



3. Kerio Connect 8.3.2 and newer — assign the delegate at least the **Editor** rights to **Inbox** and/or **Calendar**.

Kerio Connect 8.2.0-8.3.1 — assign the delegate at least the **Editor** rights to both **Inbox** and **Calendar**.



4. Confirm.

Kerio Connect Sync app for Android devices

Overview



New in Kerio Connect 8.5.2!

As an alternative to Exchange ActiveSync, the **Kerio Connect Sync** application for Android devices uses CalDAV and CardDAV to:

- Synchronize your tasks, calendars, and contacts
- Synchronize public folders
- Push notifications to immediately synchronize changes
- Synchronize calendar colors

Kerio Connect sync is a free application available on Google Play.

Installing the application

To install Kerio Connect Sync, download the app from [Google Play](#).

Configuring your account



This article is based on Android 5.0.2

To start synchronizing:

1. On your Android device, open Kerio Connect Sync.
2. Type your email address and tap **Next**.
3. Type your password and tap **Next**.
4. Verify (or type) the server name, your username and password, and tap **Sign in**.

Add account ...

Server

mail.feelmorelaw.com

Username

powaro

Password

..... Abc

Sign in

5. Confirm the certificate for your server if warning appears.
6. Select the task and calendar folders to synchronize with your device and tap **Next**. You can change the settings any time later.
7. Select the contact folders to synchronize with your device and tap **Finish**.

Kerio Connect Sync app for Android devices

You can change the settings any time later.

8. Tap **Done**.

Kerio Connect Sync is ready to synchronize your tasks, contacts, and calendars.

Adding additional accounts

You can synchronize tasks, calendars, and contacts from multiple accounts with Kerio Connect sync.

To add a new account:

1. On your Android device, open the **Kerio Settings** app.
2. Tap **Add account**.
3. Follow the same procedure as described above.

Removing accounts

To delete an account from Kerio Connect Sync:

1. On your Android device, open the **Kerio Settings** app.
2. Tap **Remove account**.
3. Tap the account you want to remove.
4. Tap **OK** to confirm the deletion.

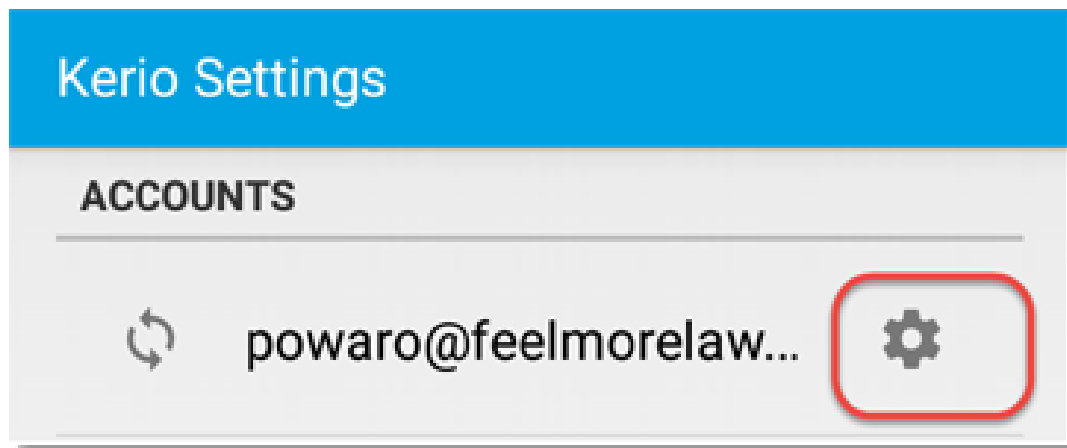
Selecting folders for synchronization

Tasks and calendars

You can select the folders to synchronize with your Android device in your calendar or task application settings.

You can also select the folders in the Kerio Connect Sync application:

1. Open the **Kerio Settings** app on your Android device.
2. Tap the gear icon next to your email address.



3. Tap **Select calendars to sync**.

The list with calendar and task folders opens.

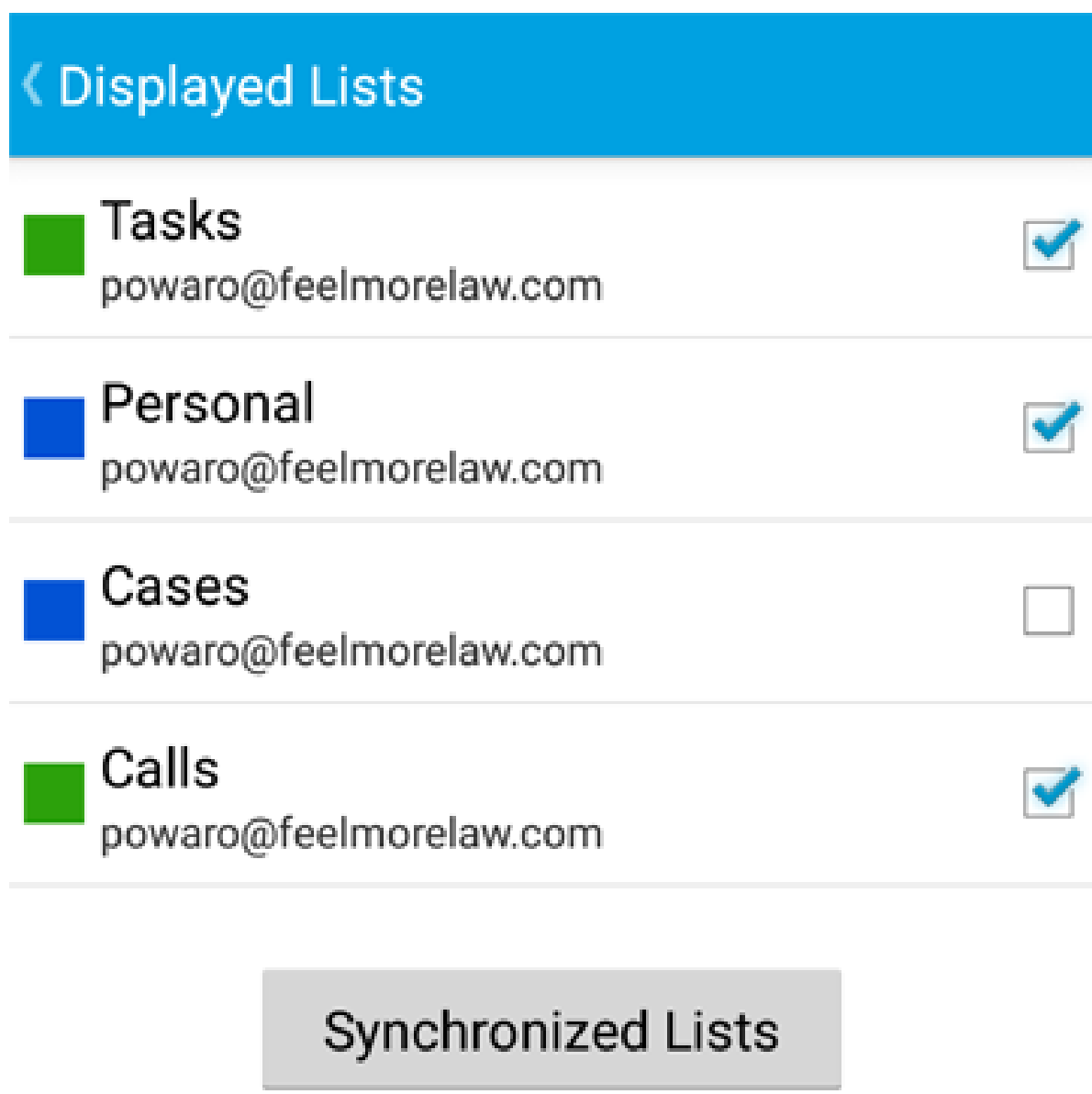
4. Select folders to synchronize.

To select the task folders to synchronize, you can also:

1. Open the **Tasks** app on your Android device.
2. Go to the settings.
3. Tap the **Displayed Lists** option.

The list of all your task folders appears.

4. Select the folders you want to synchronize.



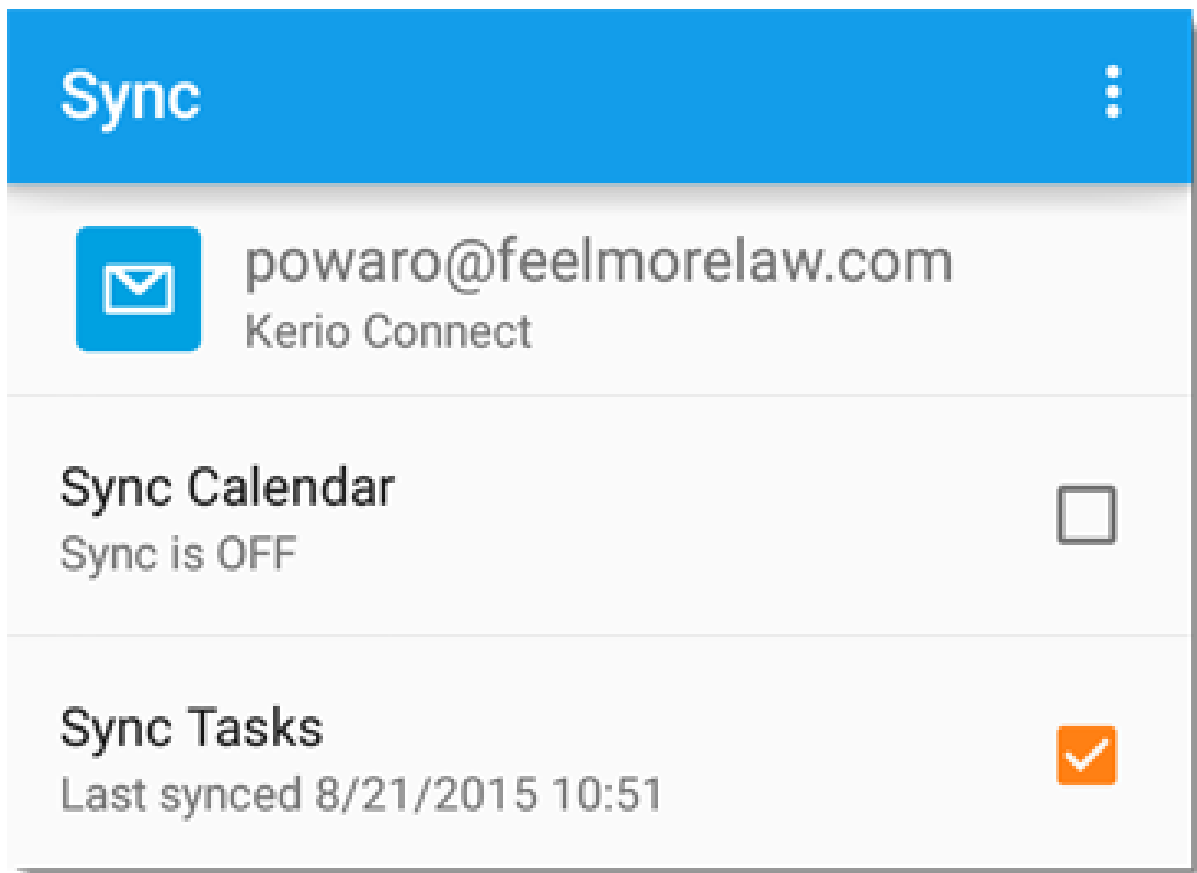
Contacts

You can select the folders to synchronize with your Android device in your contacts application settings.

Switching off the synchronization

To star/stop synchronizing tasks, and calendars in general:

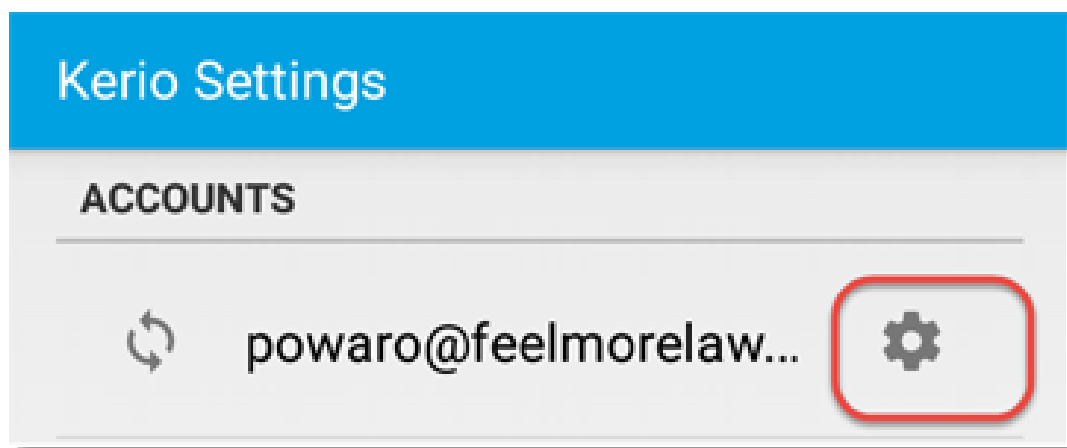
1. Open the **Kerio Settings** app on your Android device.
2. Tap your email address.
3. Select the desired options.



Setting the synchronization interval

Kerio Connect sync can synchronize the folders to your Android device periodically and you can select how often:

1. Open the **Kerio Settings** app on your Android device.
2. Tap the gear icon next to your email address.



Kerio Connect Sync app for Android devices

3. Select **Enable Push** to immediately receive updates upon change.
This option depends on your server settings.
4. Select the **Periodic auto sync** option.
5. Tap **Sync interval** and select how often to synchronize your account.

Sync settings for powaro@feelmorrelaw.c...

Get help

Open account settings help in a browser.

SERVER SETTINGS

Select calendars to sync

Enable Push

Enables instant updates, if supported by the server.



SYNC INTERVAL

Periodic auto sync



Sync Interval

2 hours

DATA SERVICE SETTINGS

Use cellular networks



Creating contacts and calendar events

Your contacts and calendars synchronize to your mobile device. Open your device's contact/calendar application to create, edit, or remove contacts and calendar events.

Creating tasks

Kerio Connect Sync contains the **Tasks** application where you can add, edit and remove your tasks.

To create a new task:

1. On your Android device, open the **Tasks** app.
The application with your task folders opens.
2. Tap the plus sign.
3. Select the task folder.

Edit Task X ✓

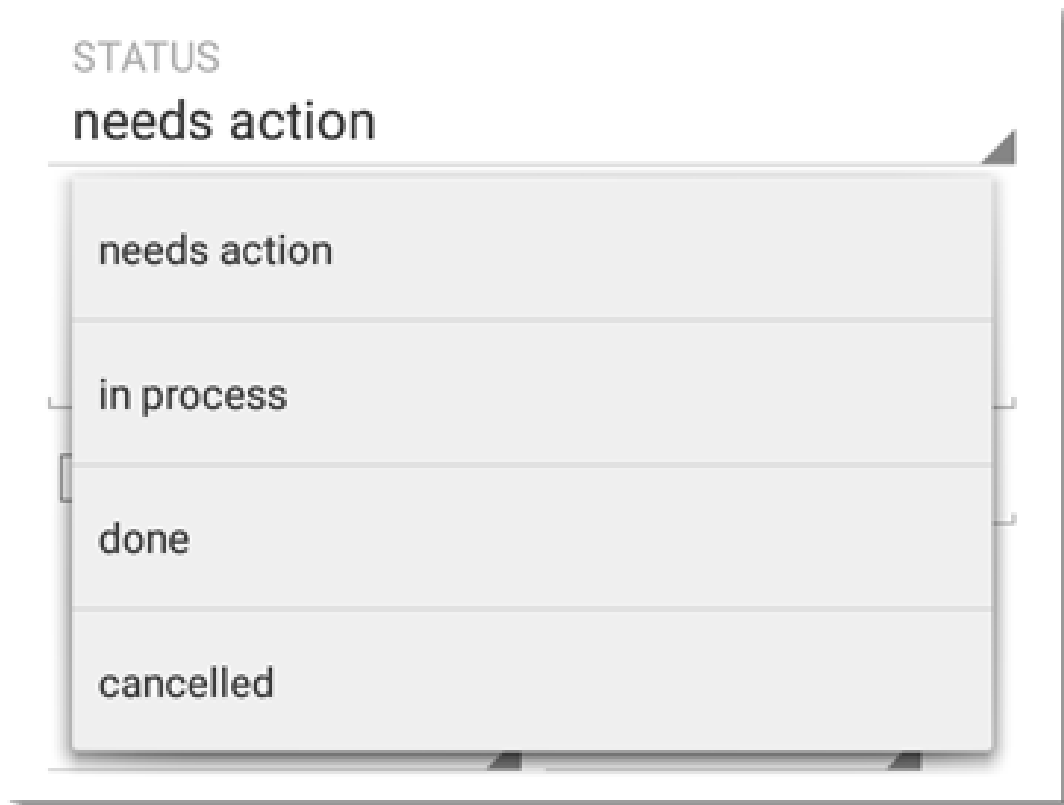
Calls
powaro@feelmorrelaw.com

-  **Calls**
powaro@feelmorrelaw.com
-  **Cases**
powaro@feelmorrelaw.com
-  **Personal**
powaro@feelmorrelaw.com
-  **Tasks**
powaro@feelmorrelaw.com

☐

DUE

4. Type the name for the task.
5. Select the task status.



6. Add a description.
7. Select the due date and time.
8. Save the task by tapping the tick sign .
9. Tap **OK** to confirm the deletion.

Editing tasks

To edit a task:

1. Open the **Tasks** application on your Android device.
2. Tap the task folder.
3. Tap the task you want to edit.
The task detail screen opens.
4. Tap the pencil icon .
5. Edit the task.
6. Save the task by tapping the tick sign .

Kerio Connect Sync opens the task for editing.

Completing tasks

To mark tasks as complete:

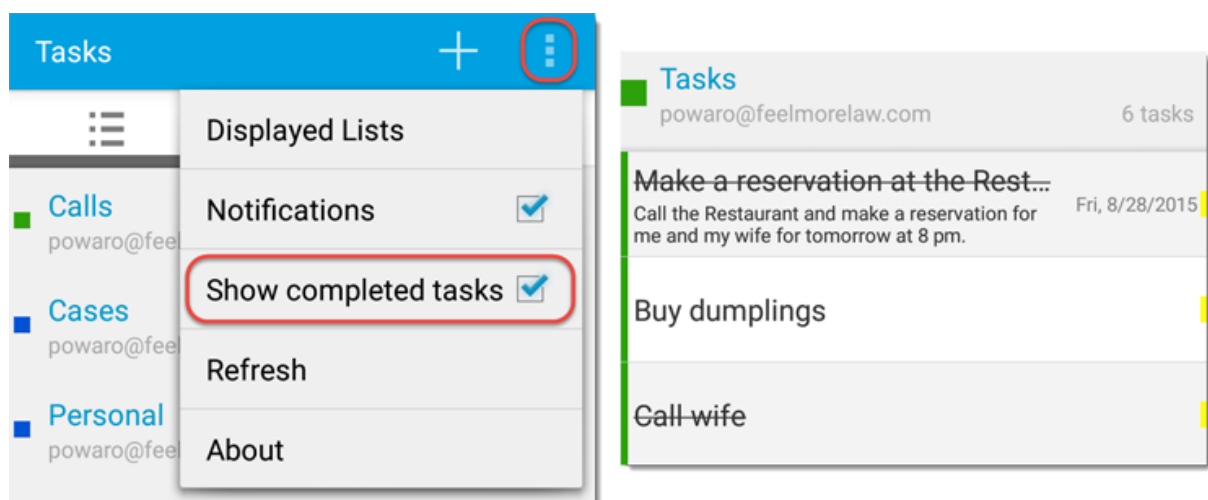
1. Open the **Tasks** application on your Android device.
2. Tap the task folder.
3. Tap the task you want to mark as complete.
The task detail screen opens.
4. Tap the icon.

Displaying completed tasks

By default, completed tasks disappear from your task lists. To see them again:

1. Open the **Tasks** application on your Android device.
2. Go to the settings.
3. Enable the **Show completed tasks** option.

You can see completed tasks in the task folders



Configuring an Exchange ActiveSync account on Android devices

Overview

This article describes the initial configuration of an Exchange ActiveSync account on Android devices.

The synchronization includes:

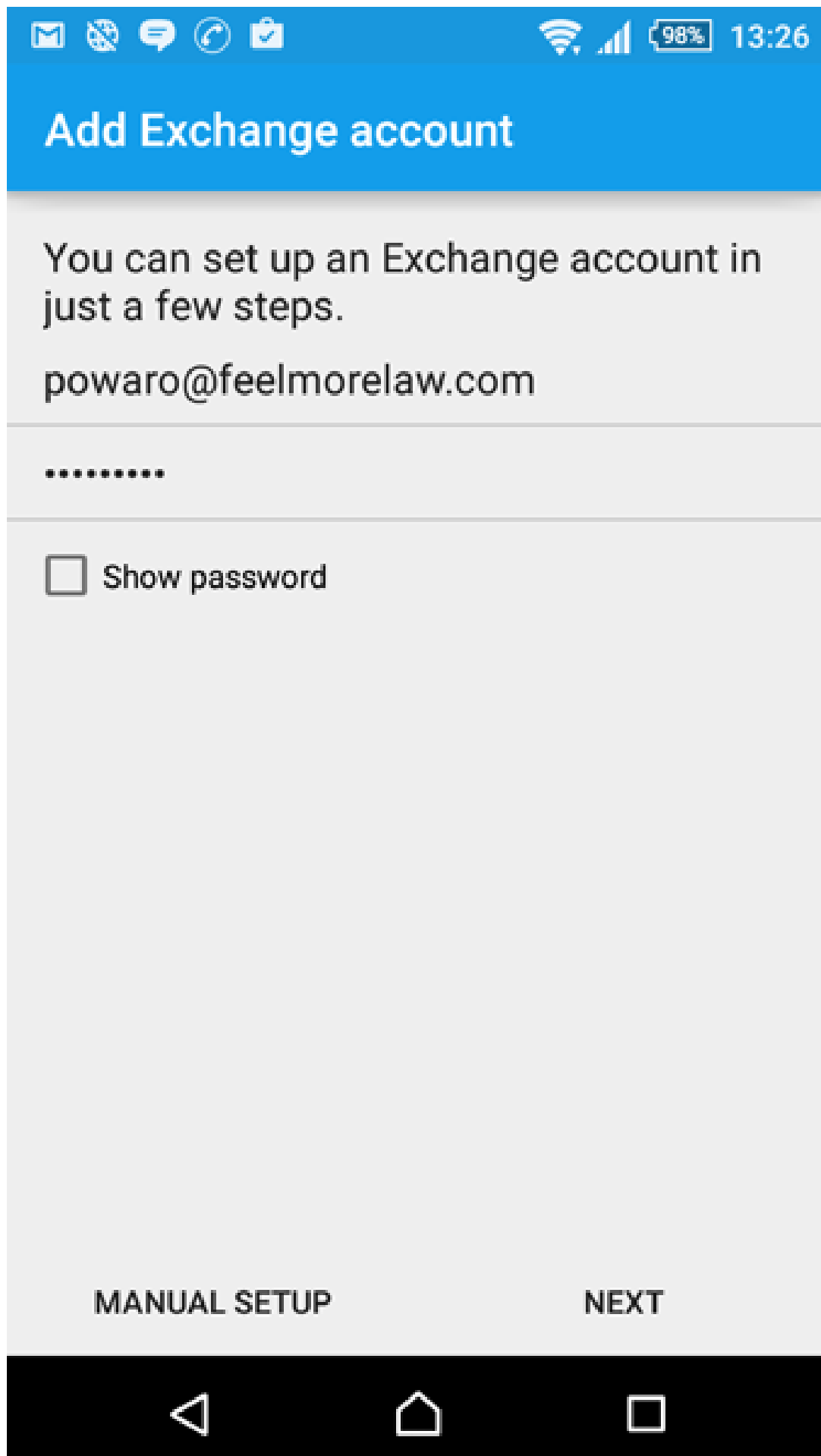
- Direct push of all email folders (See [Synchronizing folders with mobile devices](#))
- Direct push of the default contacts and calendar folders
- Meeting invitations
- Remote lookup of public and shared contacts
- Remote wipe (See [Resetting your mobile device in Kerio Connect Client](#))

Configuring your account



This article is based on Android 5.0.2

1. On your Android device, go to **Settings** → **Accounts** → **Add account**.
2. Tap **Exchange ActiveSync**.
3. Type your email address and password.



✉ 📶 🗨 🔄 📁

📶 📶 98% 13:26

Add Exchange account

You can set up an Exchange account in just a few steps.

powaro@feelmorelaw.com

.....

☐ Show password

MANUAL SETUP NEXT

Configuring an Exchange ActiveSync account on Android devices

4. Tap **Next**.

If your Kerio Connect server does not supports autodiscovery (see [How to configure an environment to enable autodiscover feature with Kerio Connect](#)), the manual configuration page is displayed.

5. Fill in the rest of the information: the domain name and the server name.

6. Select **Accept all SSL certificates** in case Kerio Connect uses a self-signed certificate.

Incoming settings

Domain\Username
feelmorelaw.com\powaro

Password
.....

Server
mail.feelmorelaw.com

☒ Use secure connection (SSL)

☒ Accept all SSL certificates

☐ Use client certificate

CLIENT CERTIFICATE

Client certificate: None

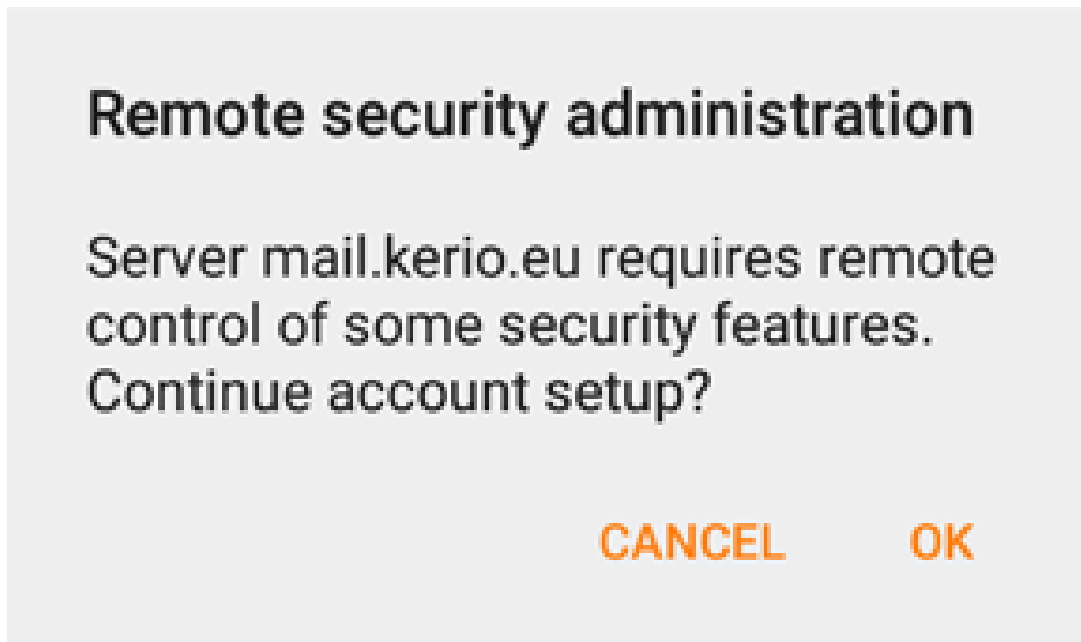
Port
443

PREVIOUS NEXT

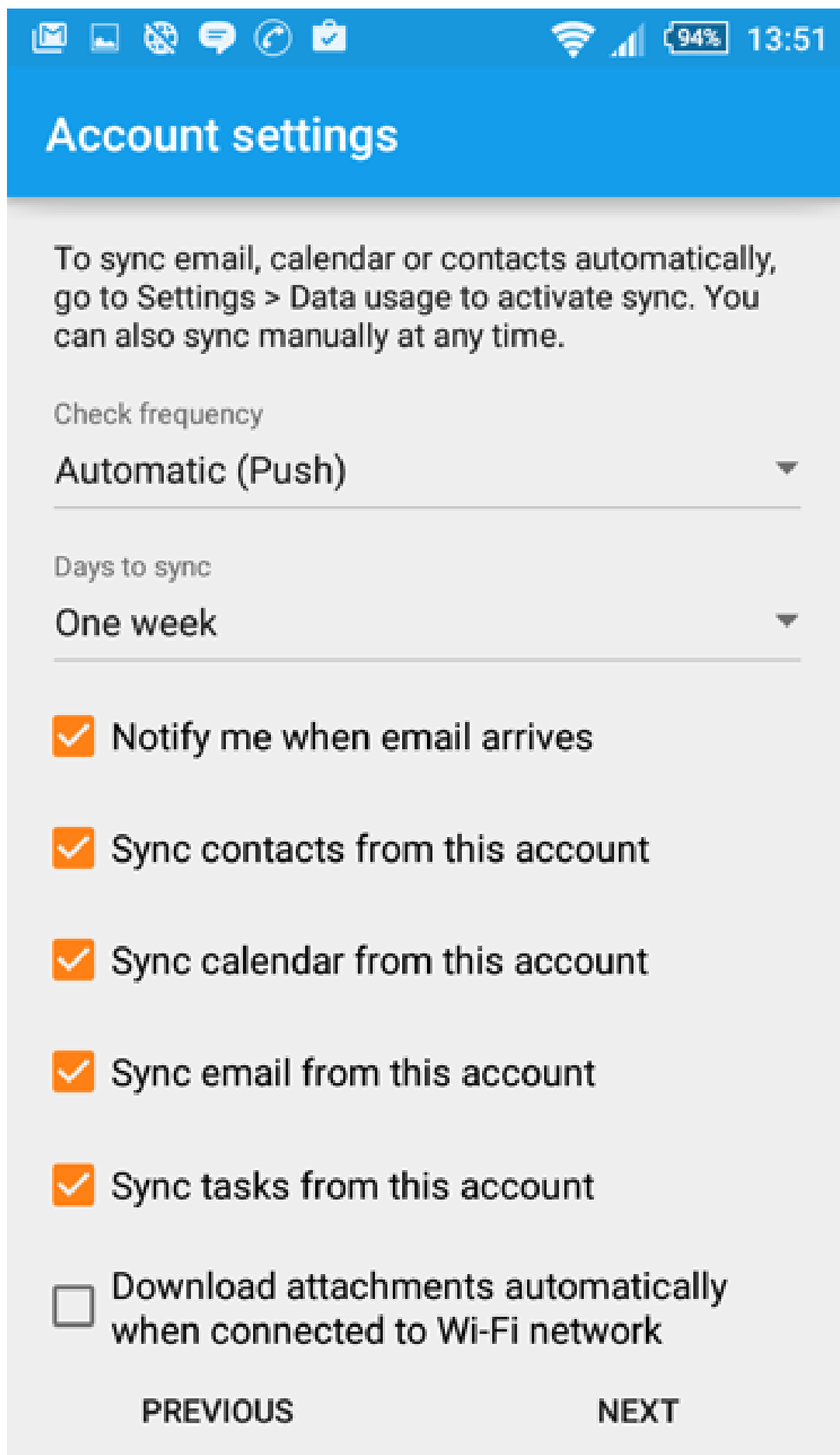


Do not change the ports.

7. Tap **Next**.
8. Confirm the **Remote security administration** dialog box to allow Kerio Connect control the security features (for example, the remote wipe).



9. Set the synchronization settings and tap **Next**.
You can set them later as well.



Configuring an Exchange ActiveSync account on Android devices

10. Type a name for the account and tap **Finish setup**.

11. Tap **Activate** to activate the security features you confirmed in step 8.

Now your account starts syncing.

To change any configuration, go to the account settings on your Android device.

Synchronizing your iPhone with Kerio Connect

Overview

To synchronize your iOS devices, including iPads and iPhones, with your Kerio Connect account:

- [Install a profile with a SSL certificate, and IMAP, CardDAV and CalDAV accounts](#)
- [Create an Exchange ActiveSync \(EAS\) account](#)



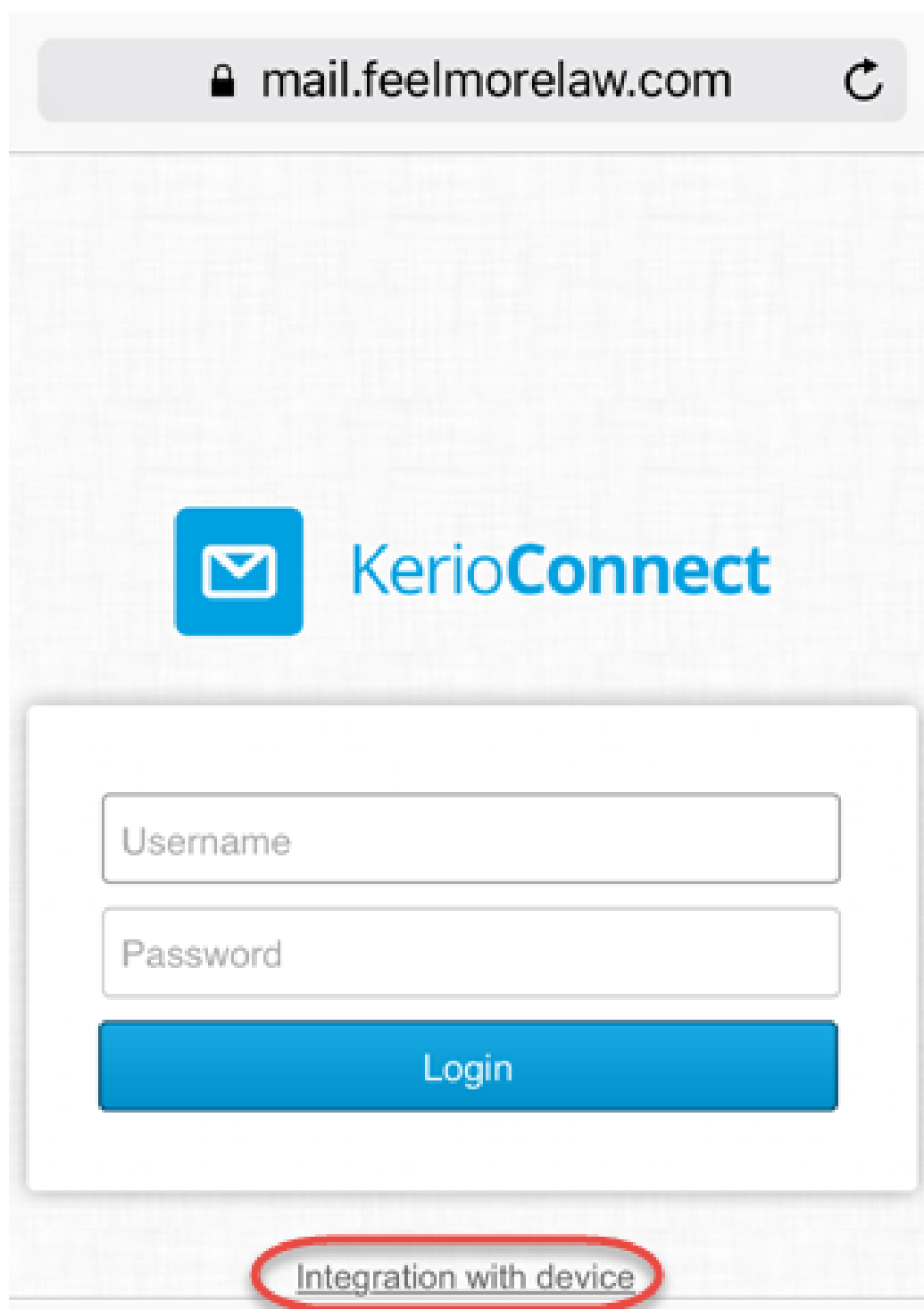
Administrators should verify the correct ports are open on the firewall. See [Server configuration](#) below.

Creating accounts automatically

Creating an IMAP account

To synchronize your account via IMAP, CalDAV and CardDAV, use the auto-configuration tool:

1. In your iPhone browser, type the URL address of Kerio Connect Client.
2. Tap **Integration with device**.



mail.feelmorelaw.com

 **KerioConnect**

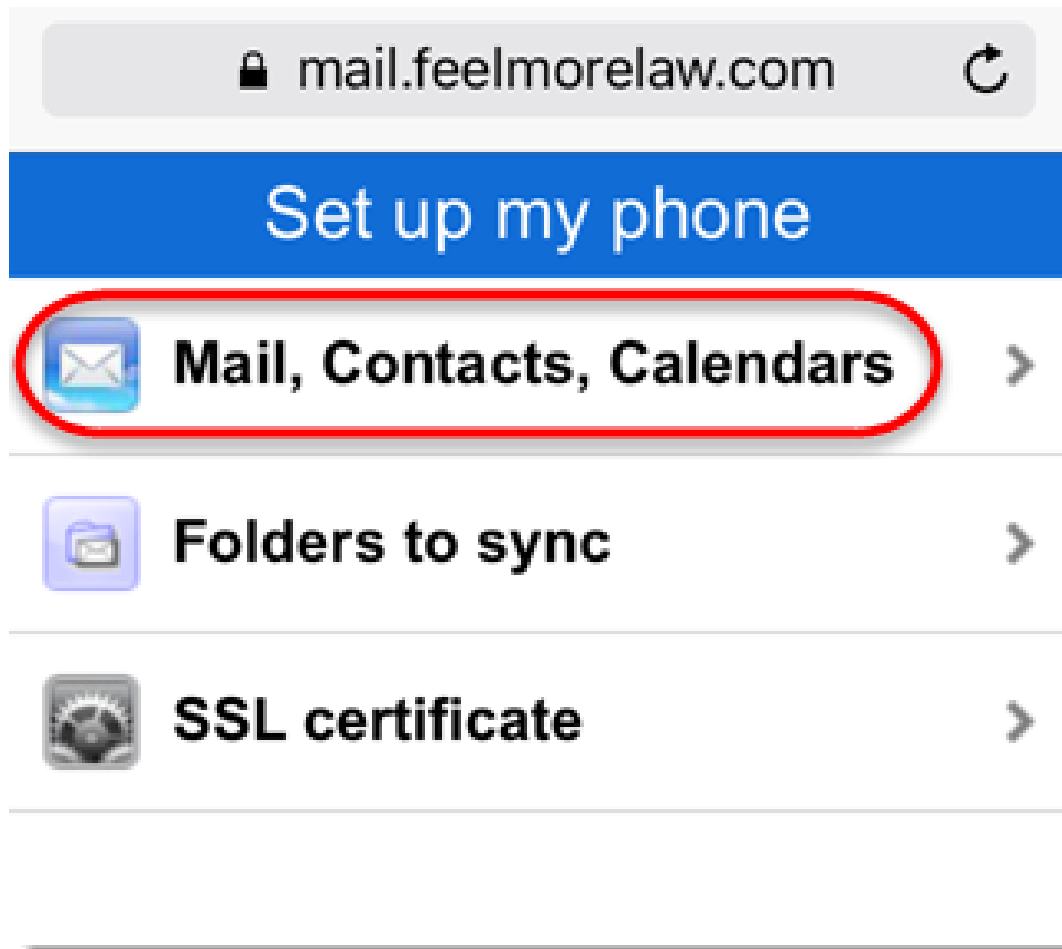
Username

Password

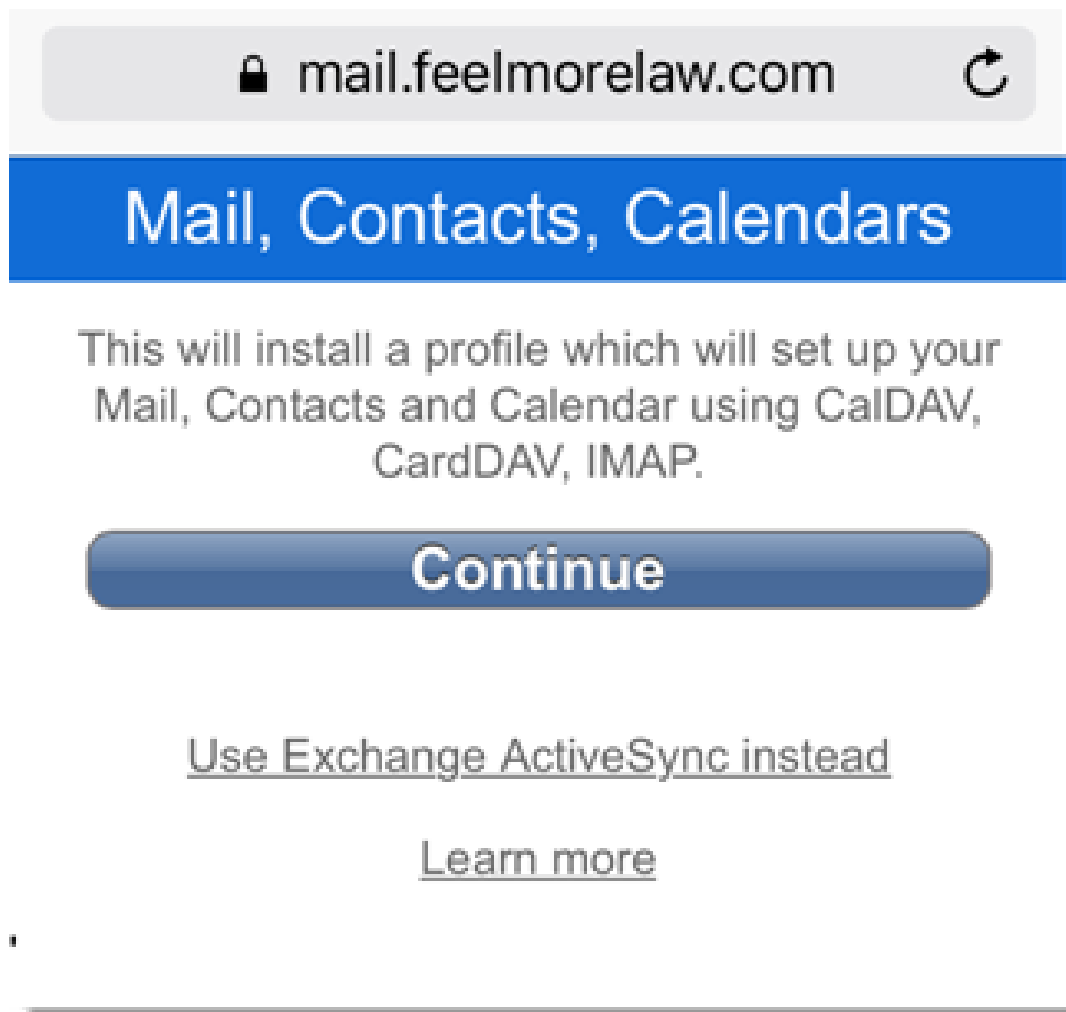
Login

Integration with device

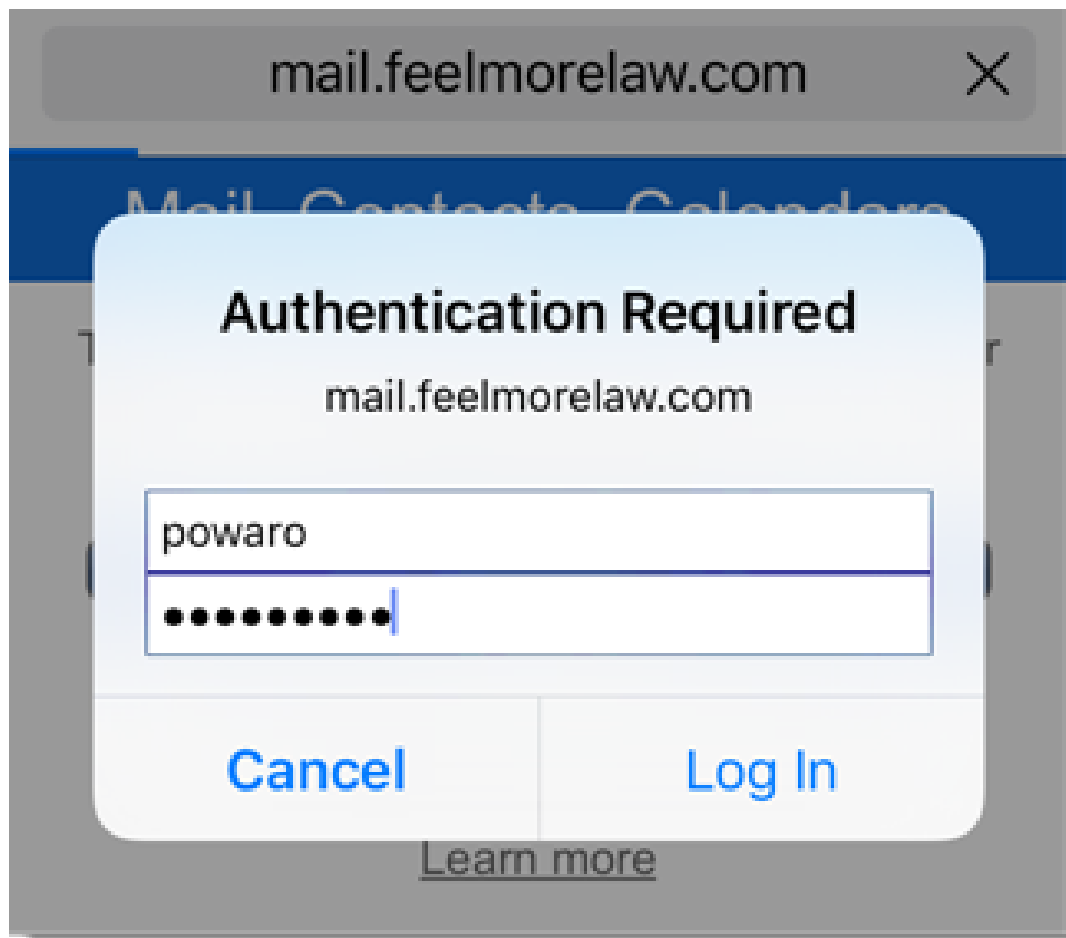
3. Tap **Mail, Contacts, Calendars**.



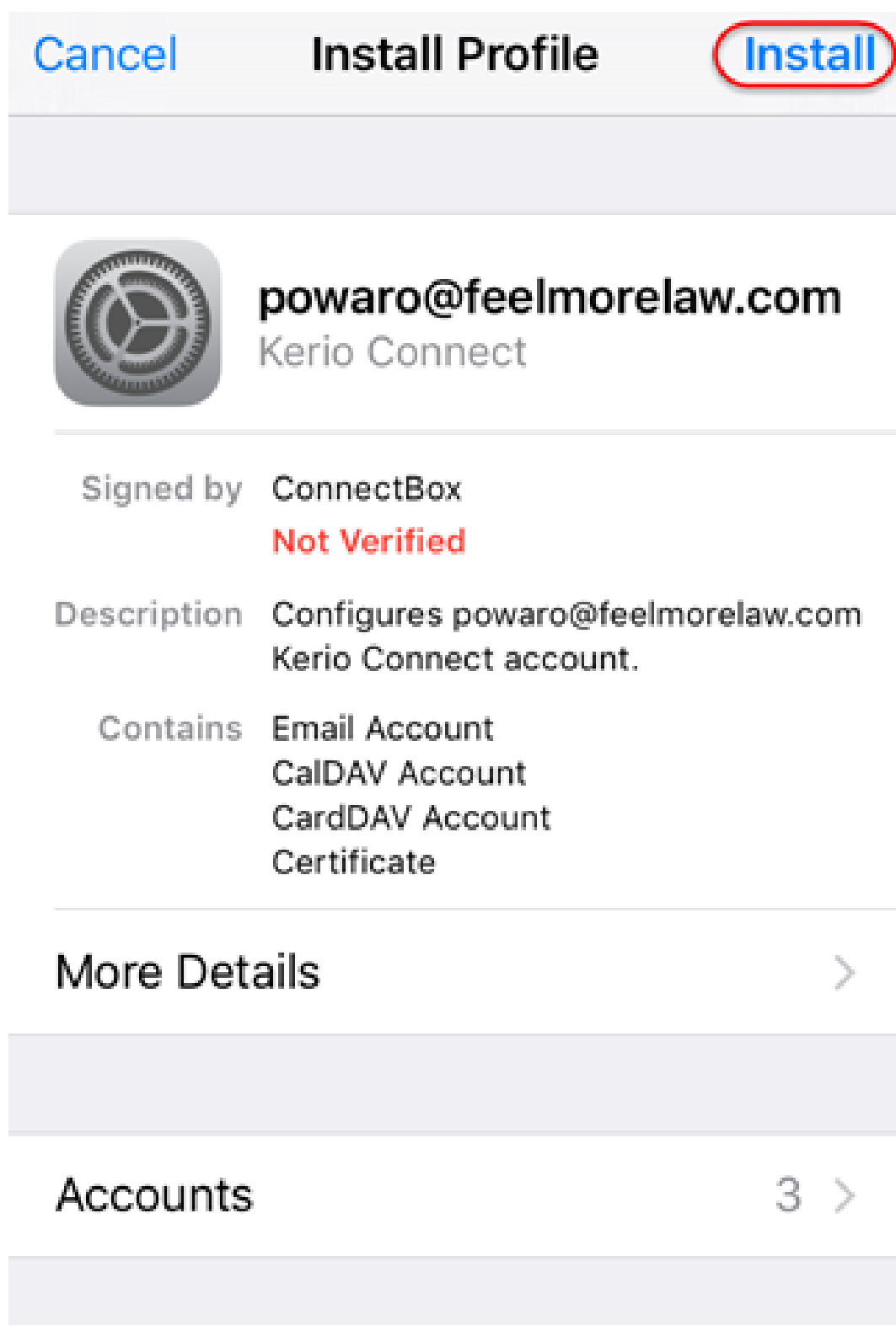
4. Tap **Continue**.



5. Type your username and password and tap **Log In**.



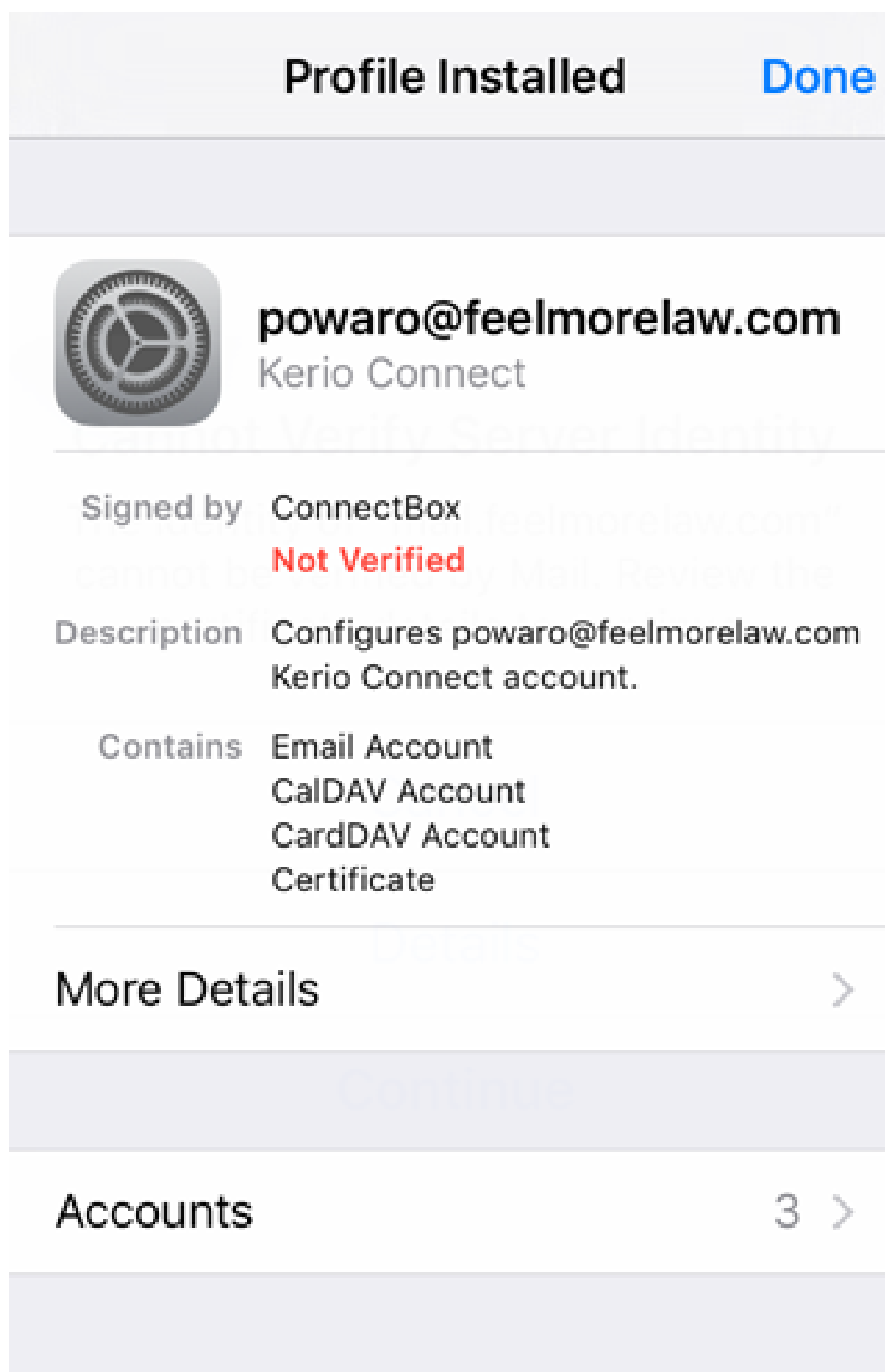
6. On the **Install profile** page, tap **Install**.



7. If your server uses, for example, a self-signed certificate, a warning may appear during the installation. Tap **Install** anyway.
8. Tap **Done**.

Your iPhone is ready. To see additional settings, go to **Settings** → **Mail, Contacts, Calendars** on your iPhone, and select the account.

To select which folders to sync to your iPhone, see [Synchronizing folders with mobile devices](#).



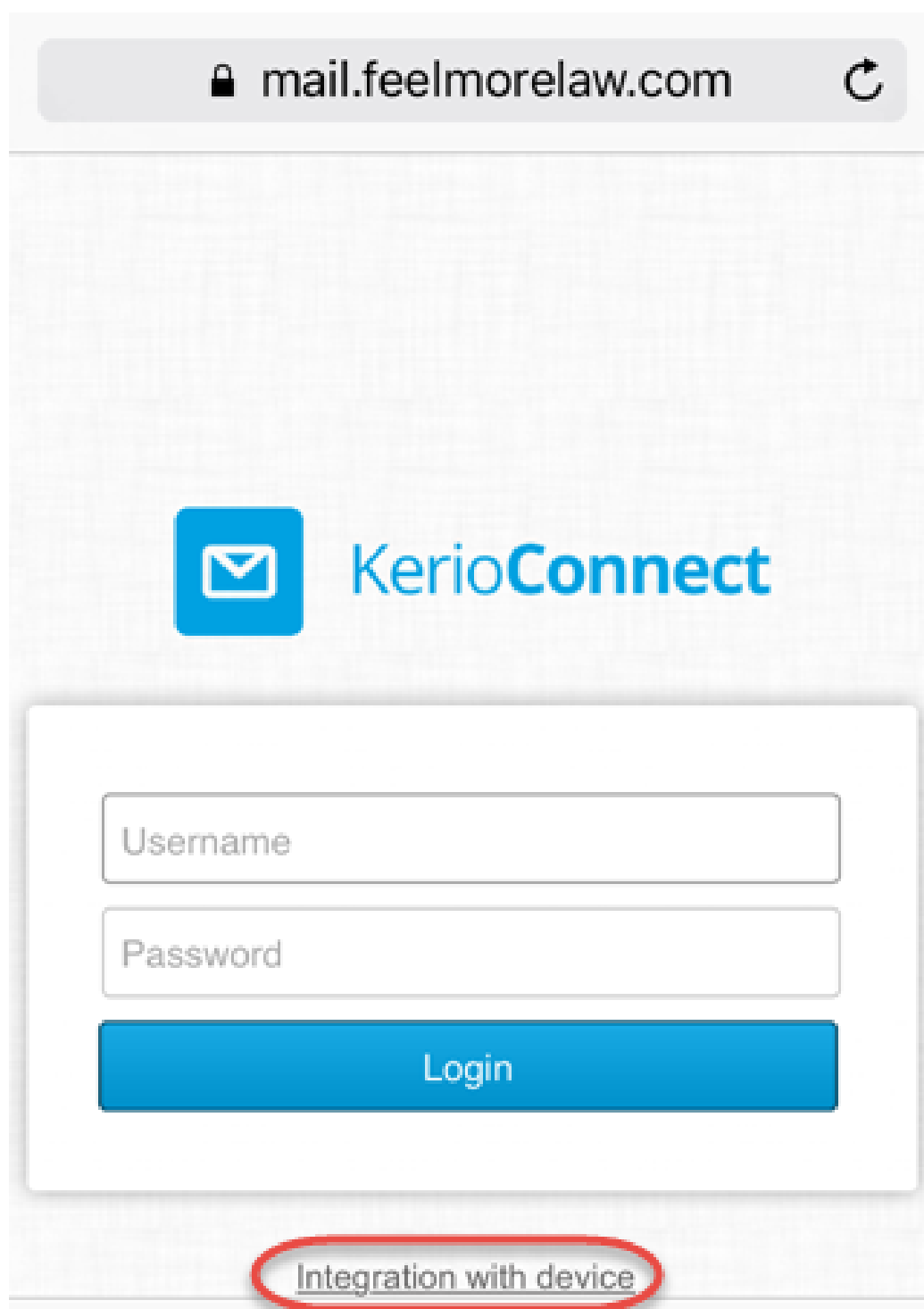
Configuring an Exchange ActiveSync account



Exchange ActiveSync (EAS) is a licensed option. Ask your administrator if your account supports EAS.

1. In your iPhone browser, type the URL address of Kerio Connect Client.
2. Tap **Integration with device**.

3. Tap **Mail, Contacts, Calendars**.



The image shows a web browser window with the address bar displaying "mail.feelmorelaw.com" and a refresh icon. The main content area features the KerioConnect logo, which consists of a blue square with a white envelope icon and the text "KerioConnect" in blue. Below the logo is a white login box containing two input fields: "Username" and "Password". A blue "Login" button is positioned below these fields. At the bottom of the page, the text "Integration with device" is underlined and circled in red.

mail.feelmorelaw.com

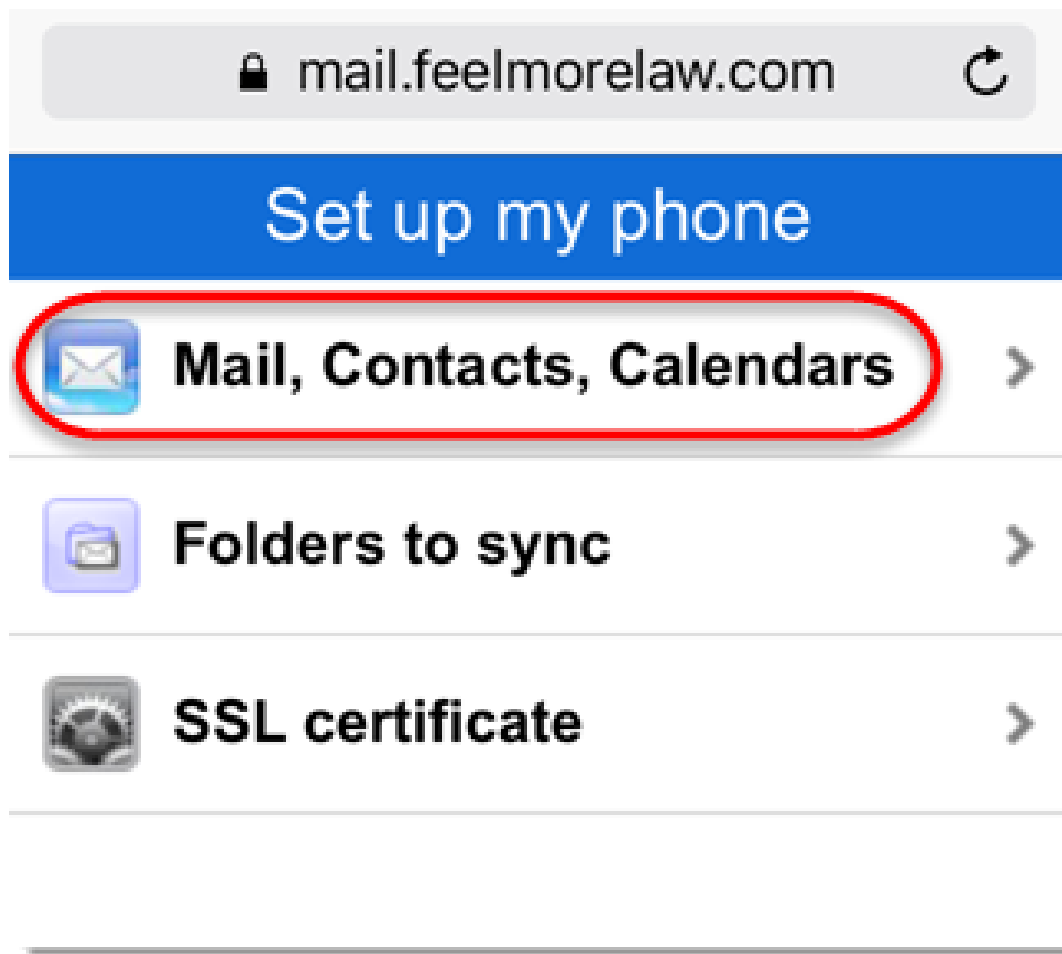
 KerioConnect

Username

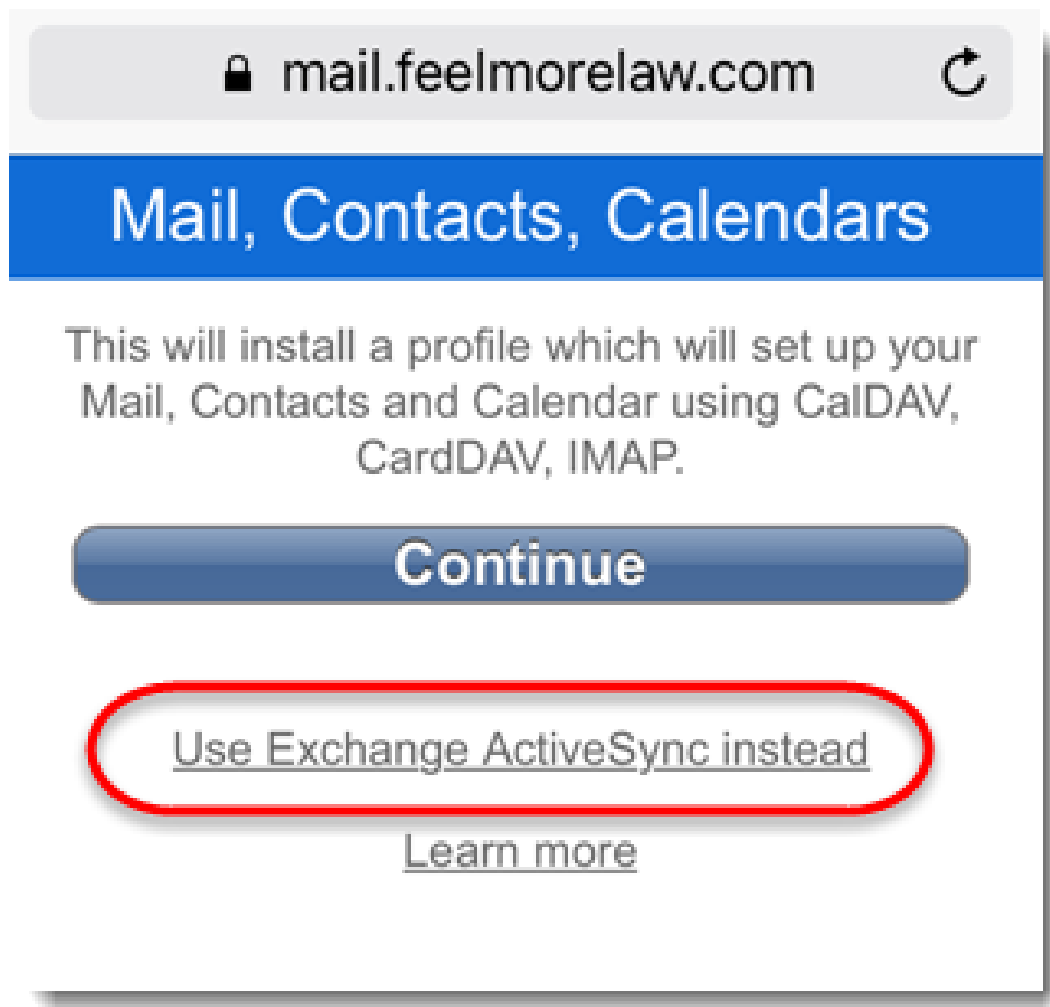
Password

Login

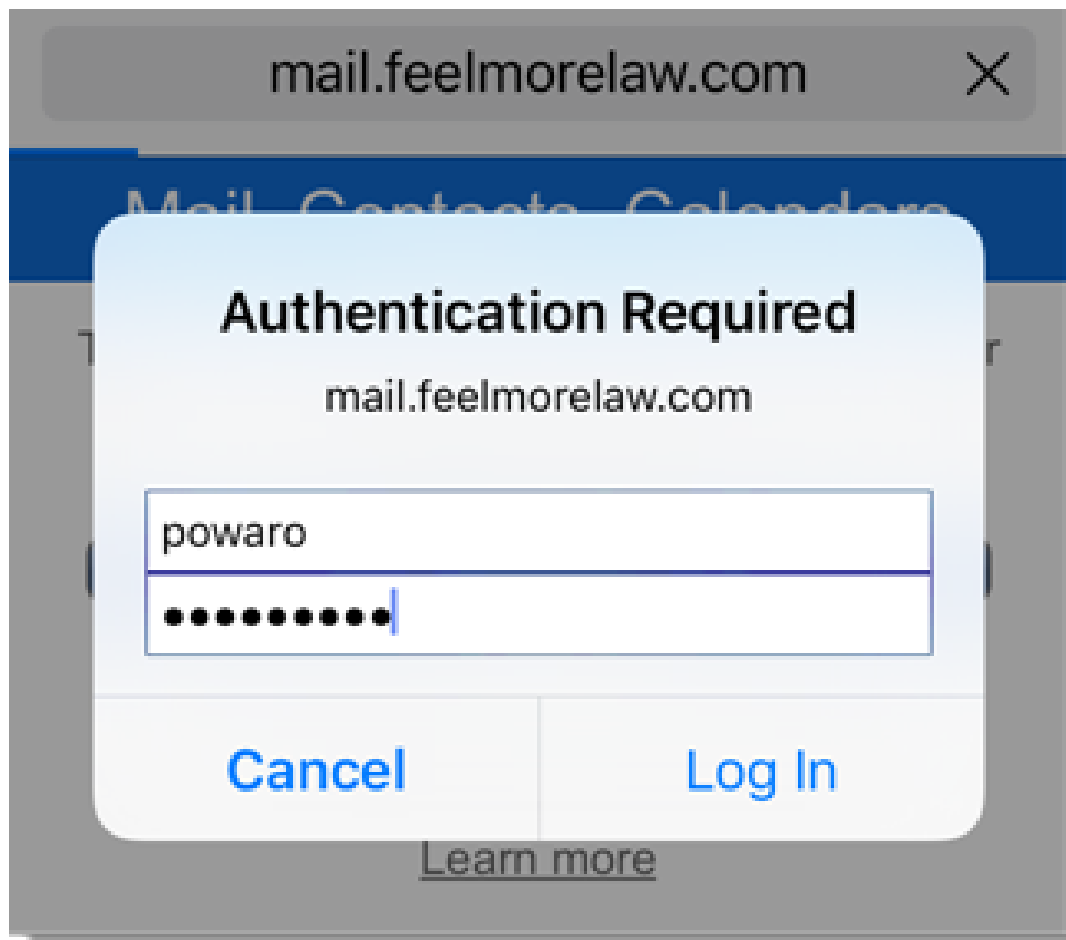
Integration with device



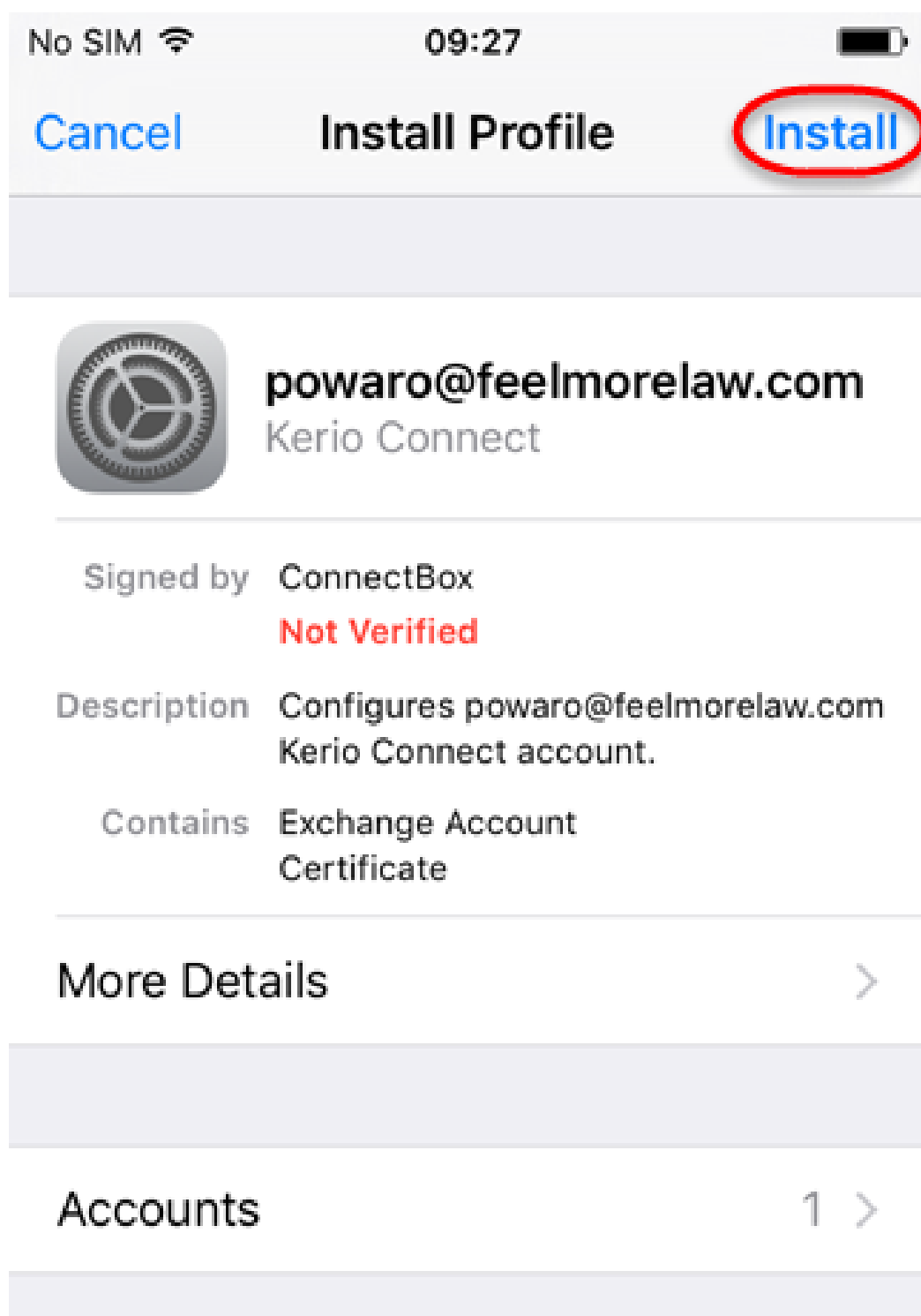
4. Tap Use Exchange ActiveSync instead.



5. Type your username and password and tap **Log In**.



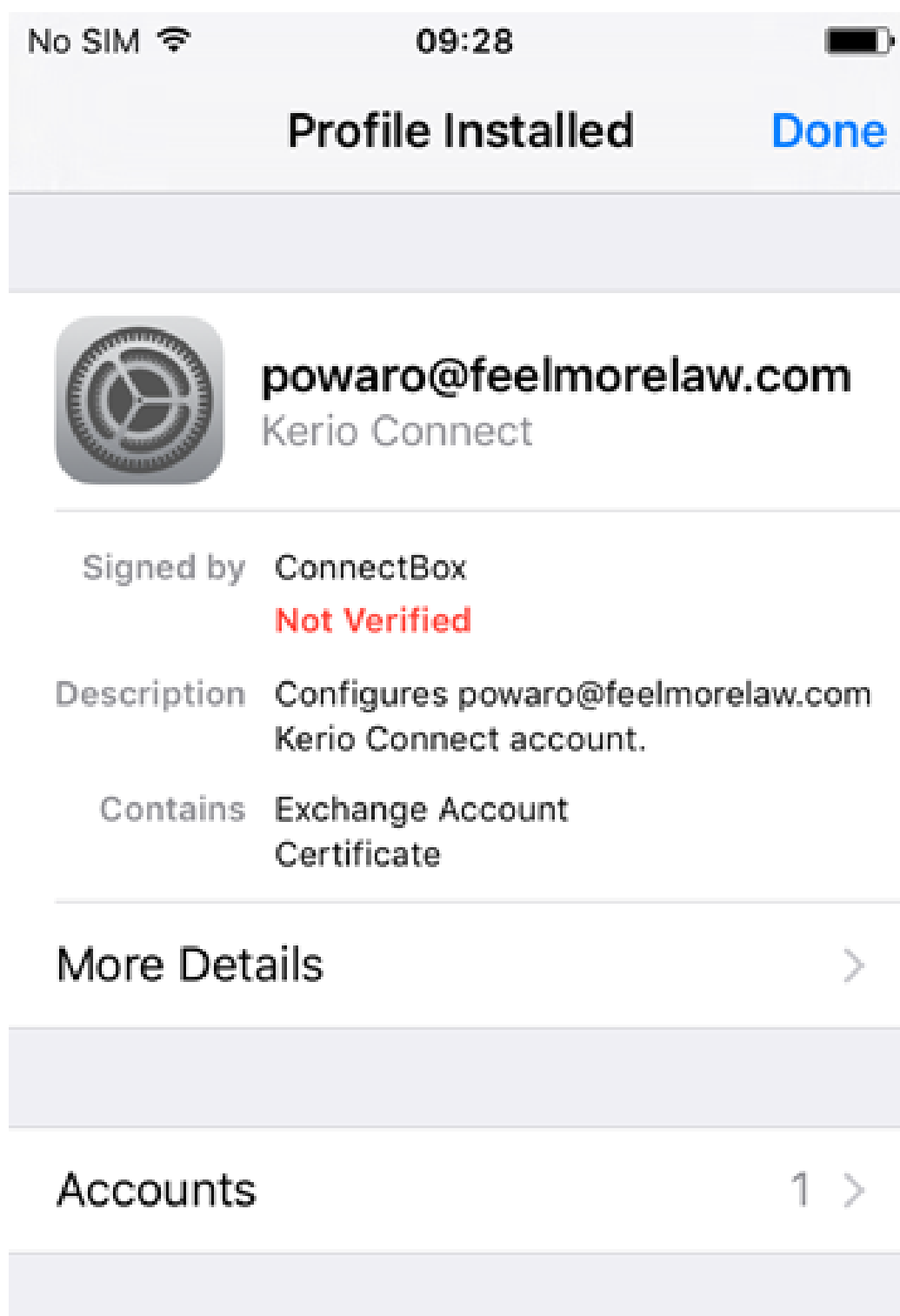
6. On the **Install profile** page, tap **Install**.



7. If your server uses, for example, a self-signed certificate, a warning may appear during the installation. Tap **Install** anyway.
8. Tap **Done**.

Your iPhone is ready. To see additional settings, go to **Settings** → **Mail, Contacts, Calendars**, and select the account.

To select which folders to sync to your iPhone, see [Synchronizing folders with mobile devices](#).





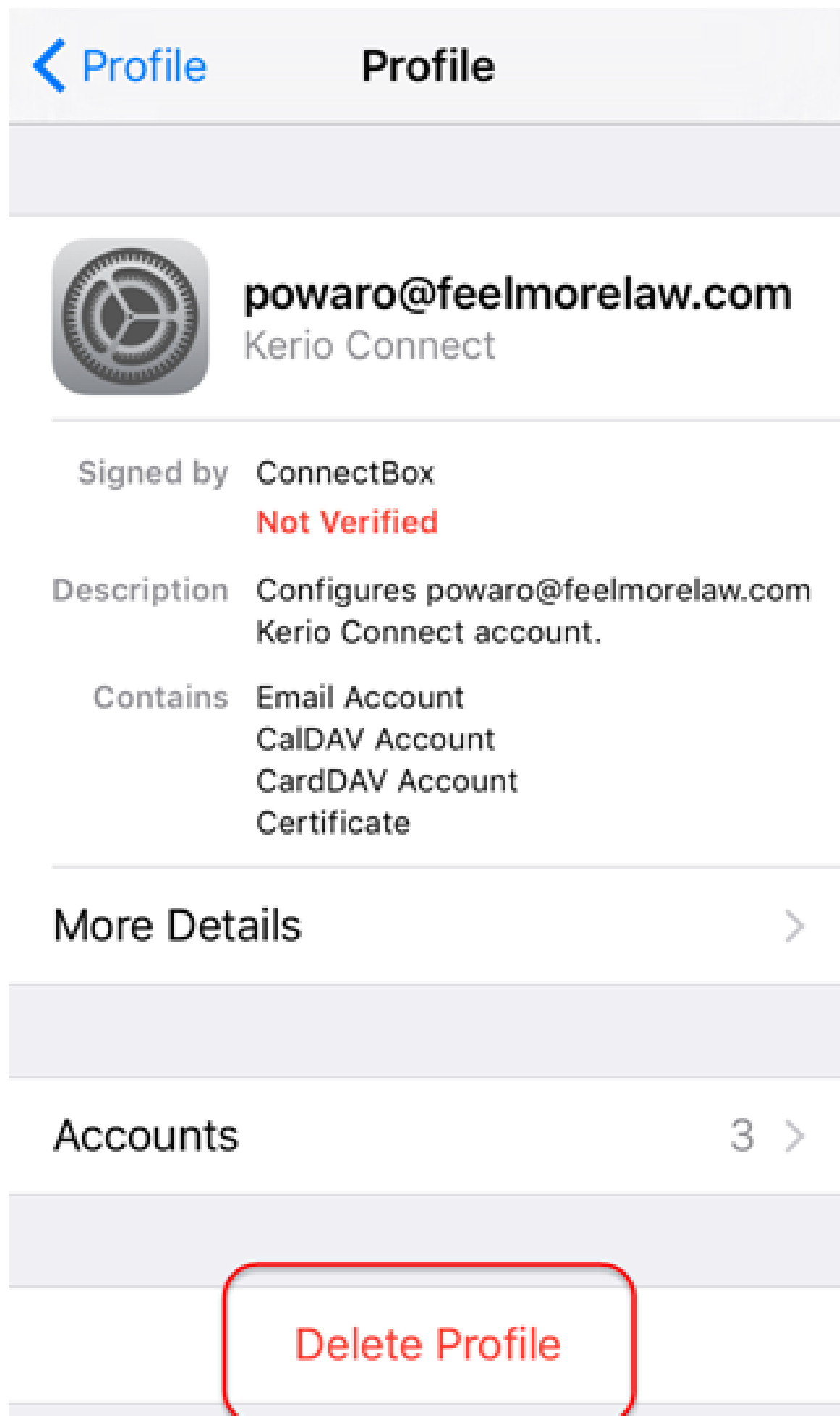
Due to the limitations of the Exchange ActiveSync protocol:

- Only the first three email addresses synchronize for each contact.
- The email address types don't synchronize (for example, work email, or home email).

Removing accounts

To remove profiles that has been installed via the auto-configuration tool, go to **Settings** → **General** → **Profiles**. Select the profile and tap **Delete Profile**.

You can remove also your Exchange ActiveSync account via your Kerio Connect Client. See [Resetting your mobile device in Kerio Connect Client](#).



Mobile Devices

List of Exchange ActiveSync devices registered with this mailbox:

	iPhone 5 Status: OK Device ID: VEV71D91PP0T34QA7LNTS6G6M0 Last Synchronization: 2/4/2016 12:38 PM	 Reset Device  Remove Device
---	---	--

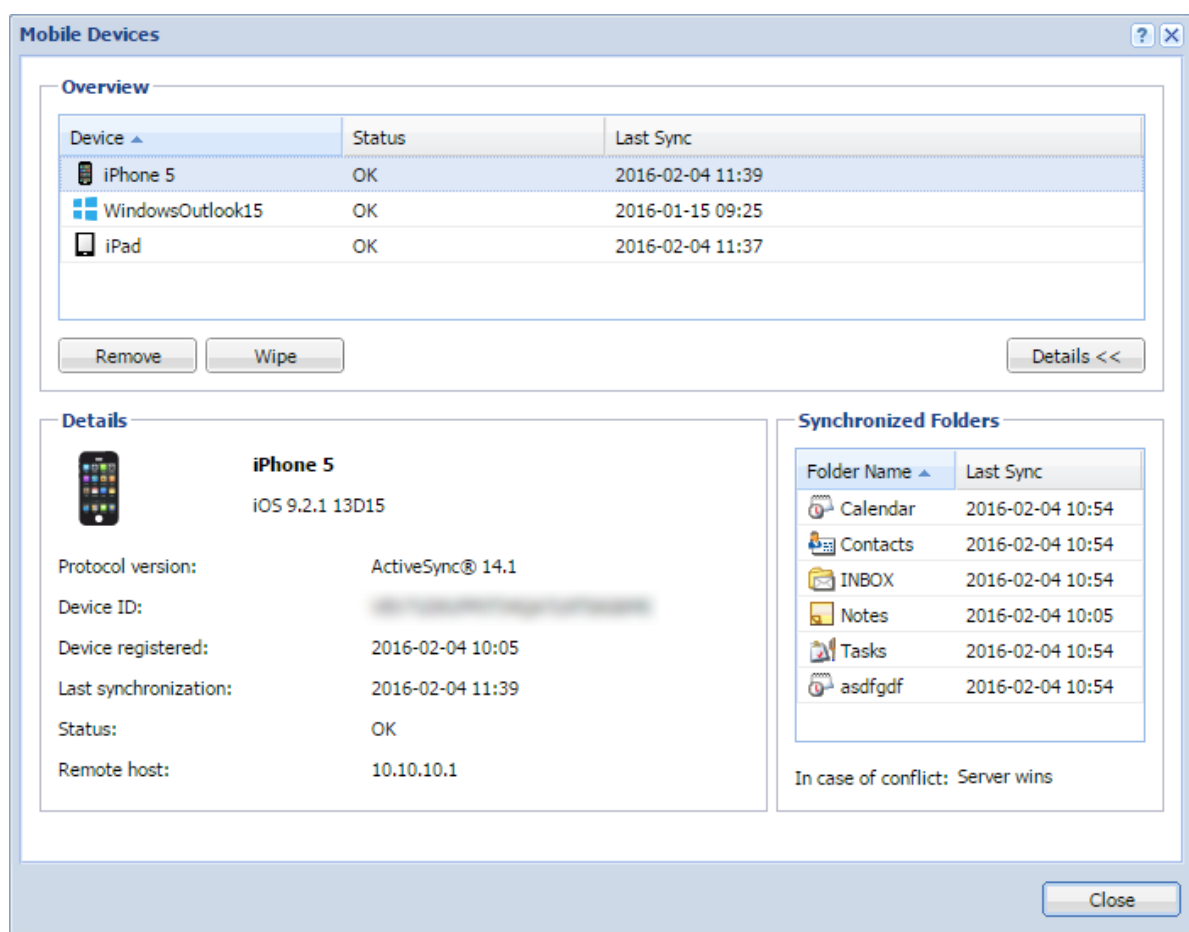
Server configuration

Administrators should open the following ports on your firewall:

CalDAV, CardDAV	TCP ports 80/443
IMAP	TCP ports 143/993
HTTP/HTTPS (EAS)	TCP ports 80/443

To verify the status of EAS connected iOS devices, go to the administration interface to **Accounts** → **Users**, select a user and click **More Actions** → **Mobile Devices**.

Synchronizing your iPhone with Kerio Connect



Installing and upgrading Kerio Outlook Connector

About Kerio Outlook Connector

Kerio Outlook Connector (Offline Edition) is a **Microsoft Outlook** extension that you can use to manage your Kerio Connect email, events, contacts, and tasks in Microsoft Outlook.

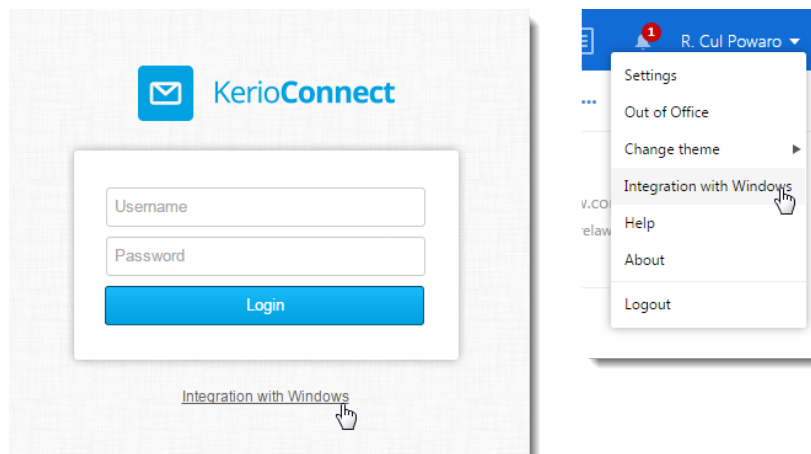
The **Offline Edition** synchronizes all changes with Kerio Connect once you reconnect.

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

About profiles

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

For Kerio Connect 8.3 and newer and Microsoft Outlook 2010 and newer, you can add [multiple Kerio Outlook Connector accounts in one profile in Microsoft Outlook](#). For older versions, 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.

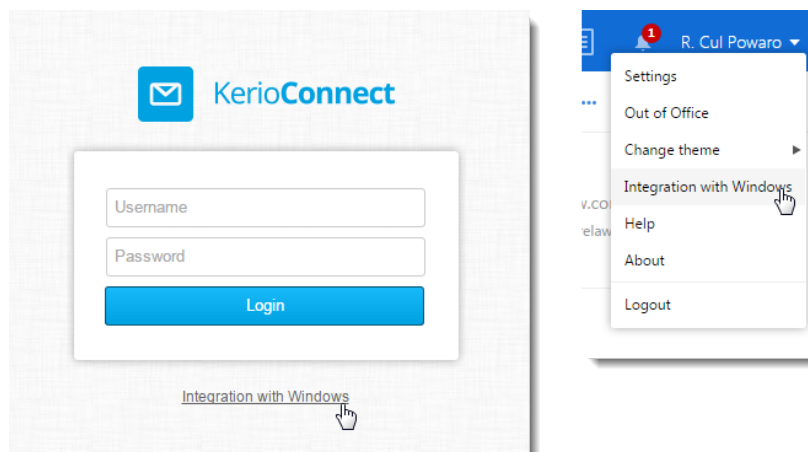
Creating user profiles

You can create profiles automatically or manually.

Automatic configuration

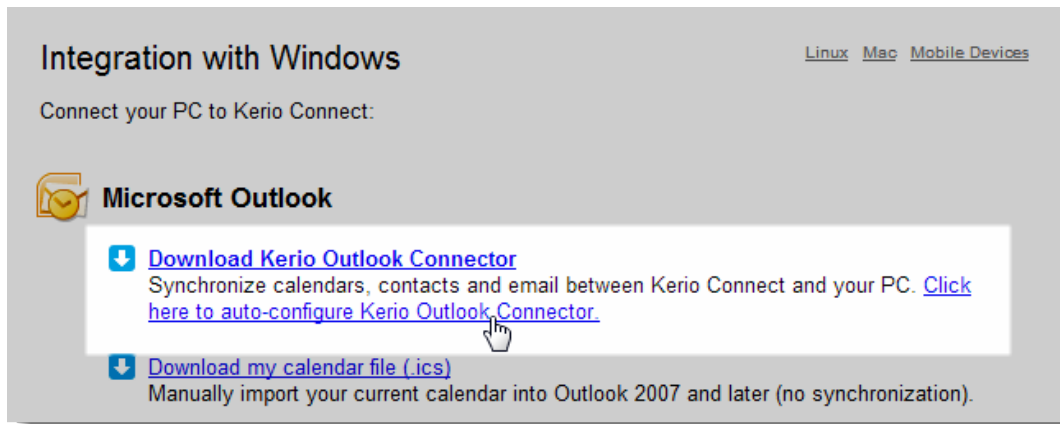
Kerio Connect has a special tool for automatic configuration of your MS Outlook account.

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**.



Creating profiles in MS Outlook

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



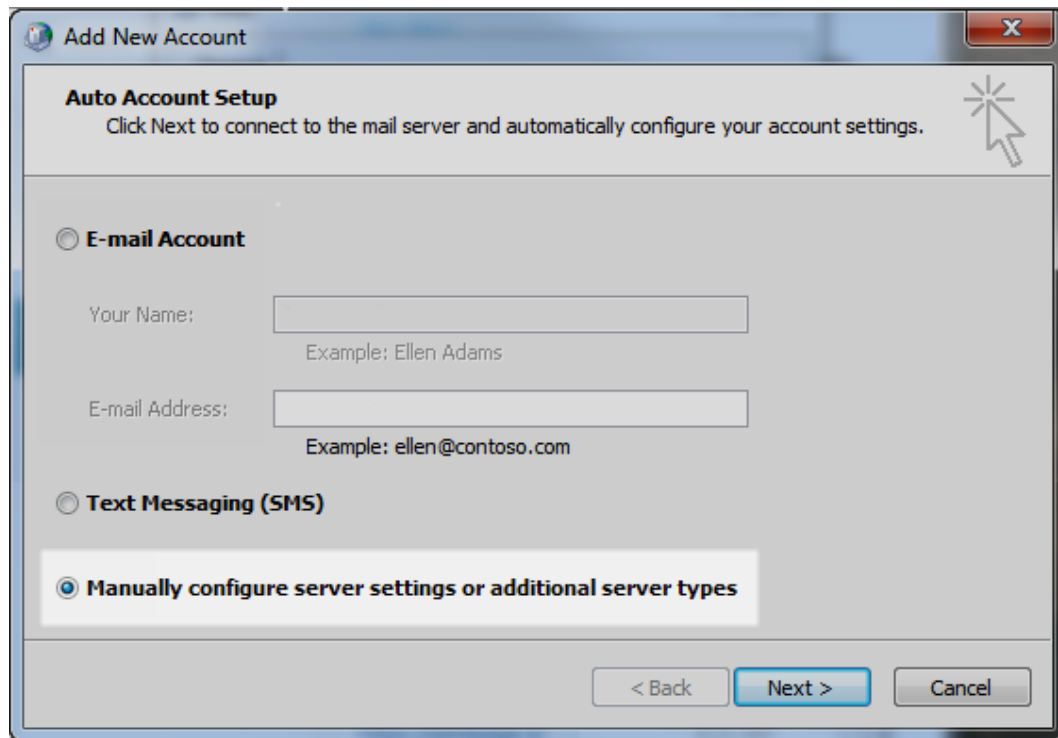
3. Run the profile creator tool.

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

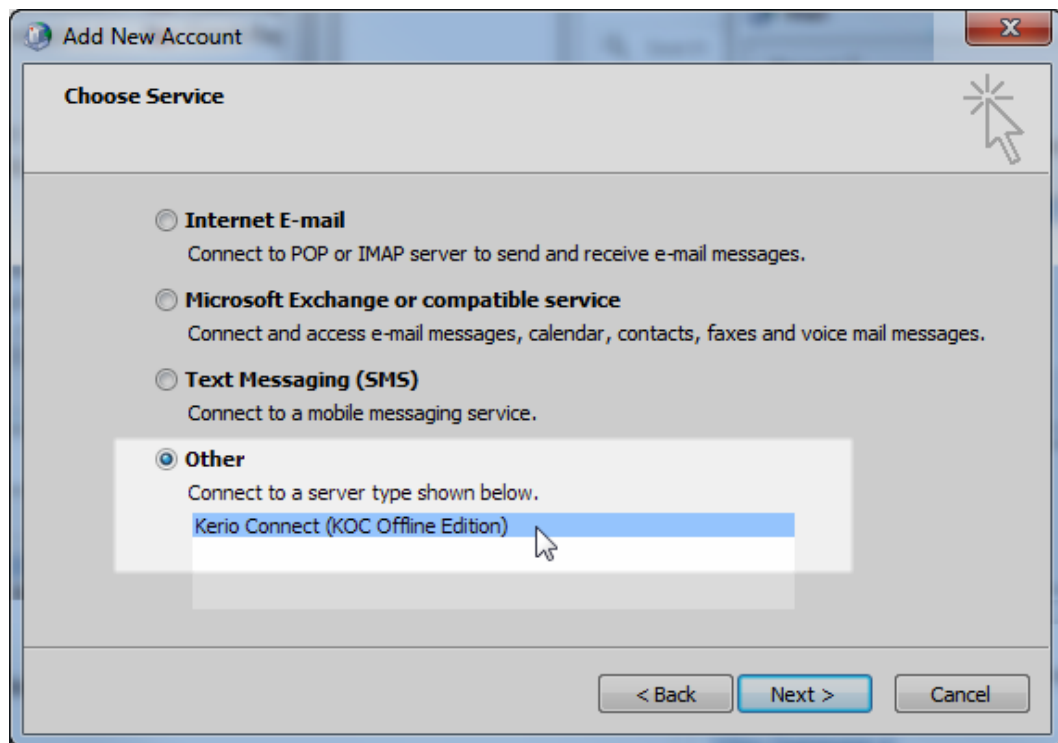
Manual configuration

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.



Creating profiles in MS Outlook

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@feelmorlaw.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.

The screenshot shows the 'Kerio Outlook Connector' dialog box with the 'Server Details' tab selected. The 'Account' tab is also visible. The 'Server name' field contains 'feelmorlaw.com'. Under the 'Authentication' section, 'Manual Authentication' is selected. The 'Account name' field contains 'regret' and the 'Password' field is masked with dots. The 'Save password' checkbox is checked. Under the 'User Information' section, the 'Username' field contains 'Meg Regret' and the 'Email address' field contains 'regret@feelmorlaw.com'. A 'Retrieve Info' button is located at the bottom right of the 'User Information' section, with a mouse cursor hovering over it. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Maintenance	Synchronization Settings
Account	Server Details Other Mailboxes

Server name:

Authentication

☐ Secure Password Authentication

☒ Manual Authentication

Account name:

Password:

☒ Save password

User Information

Username:

Email address:

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

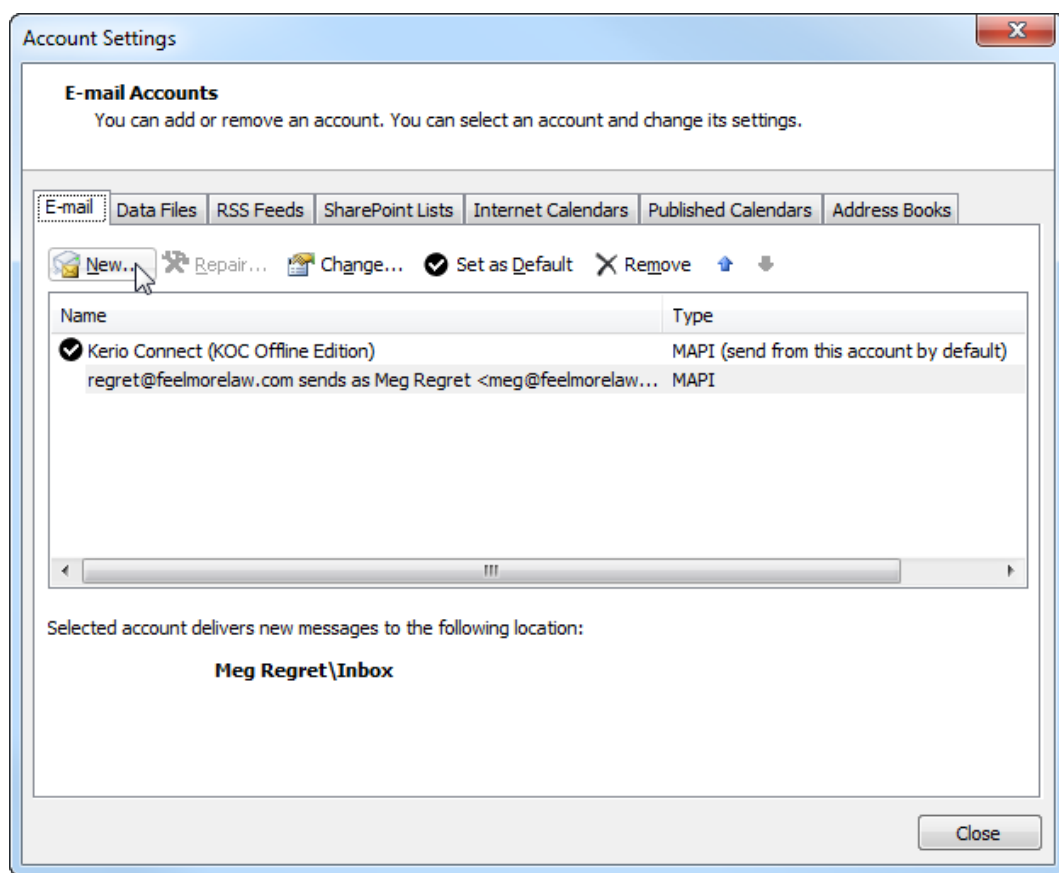
Adding multiple accounts in a single profile in Microsoft Outlook

Overview

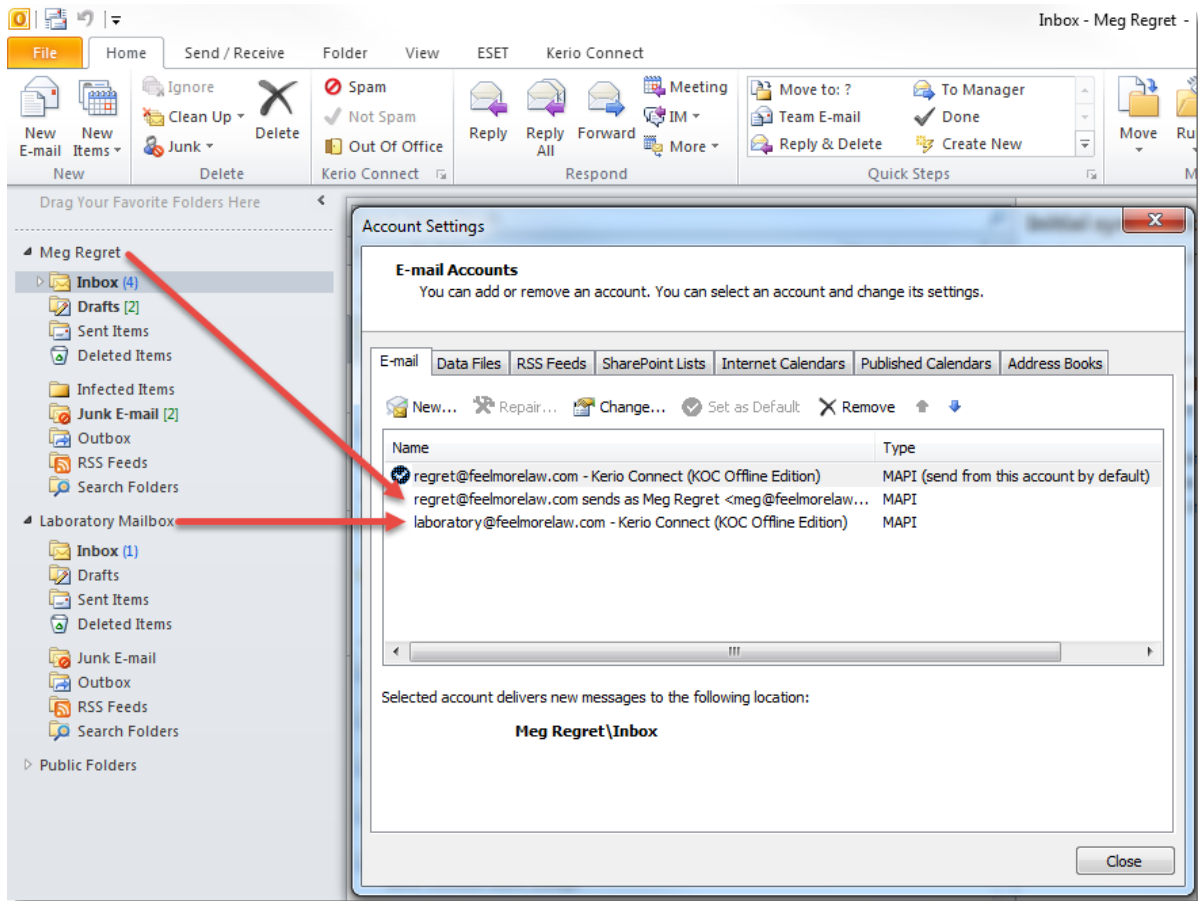
When creating [profiles in Microsoft Outlook 2010 and newer](#), you can now add multiple Kerio Outlook Connector accounts in a single profile.

Adding additional account to a profile

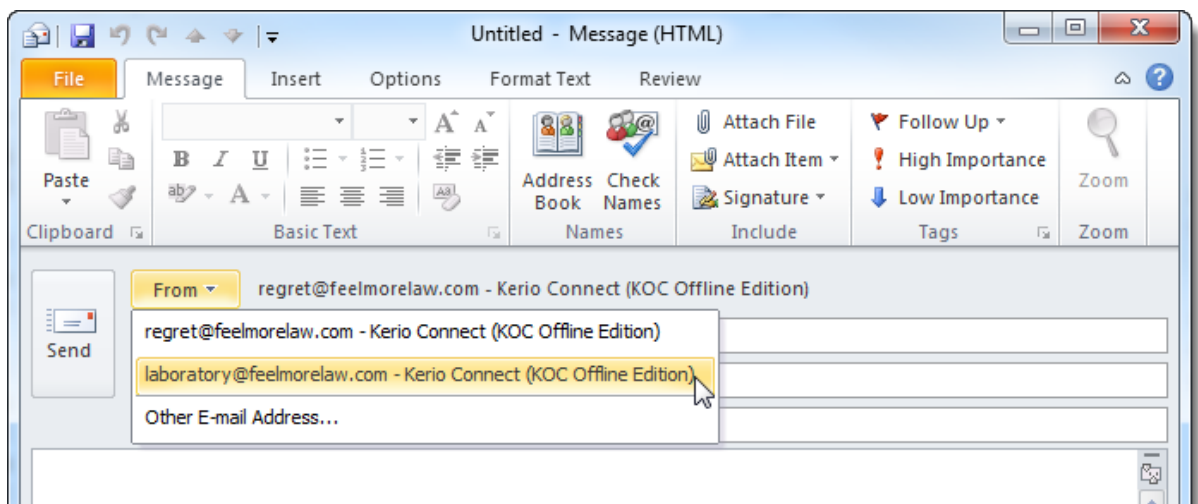
1. [Install Kerio Outlook Connector 8.3 and newer](#).
2. [Create a profile in Microsoft Outlook](#).
3. Open the profile and click **File** → **Account Settings**.
4. On the **E-mail** tab, click **New**.



5. [Configure the new account manually.](#)
6. Restart your Microsoft Outlook.



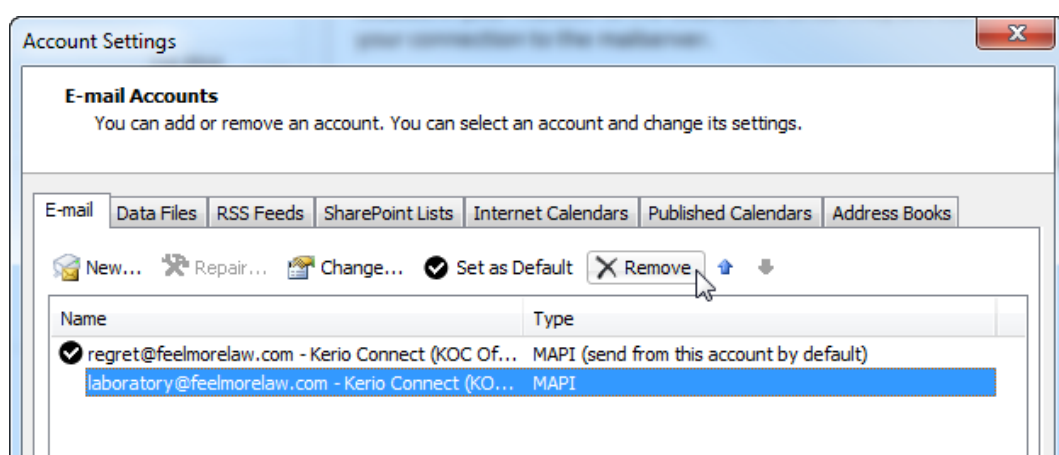
When you compose messages, you can now select from which account you want to send.



Removing accounts from a profile

To remove accounts from a profile, follow these steps:

1. Open the profile in Microsoft Outlook.
2. Click **File** → **Account Settings**
3. On the **E-mail** tab, select the account you want to delete and click **Remove**.



Synchronizing Microsoft Outlook with Kerio Connect

Online and offline modes

Kerio Outlook Connector (Offline Edition) 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:

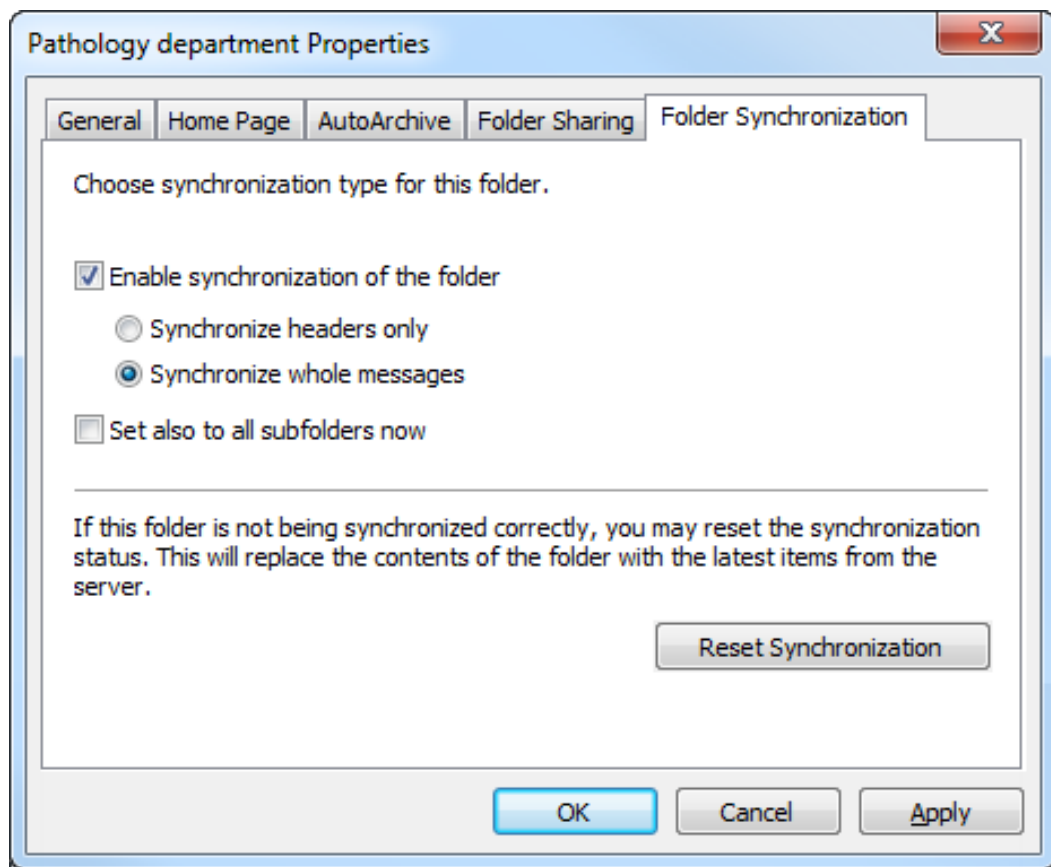
- Inbox — whole messages are synchronized.
- Other email folders — only message headers and body in plain text are synchronized.
- Events — whole events are synchronized.
- Contacts — whole contacts are synchronized.
- Tasks — whole tasks are synchronized.
- Notes — whole notes are synchronized.

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.

Sorting messages in MS Outlook

About filters

Messages delivered to you Microsoft Outlook via Kerio Outlook Connector (Offline Edition) are stored in folder **Inbox**.

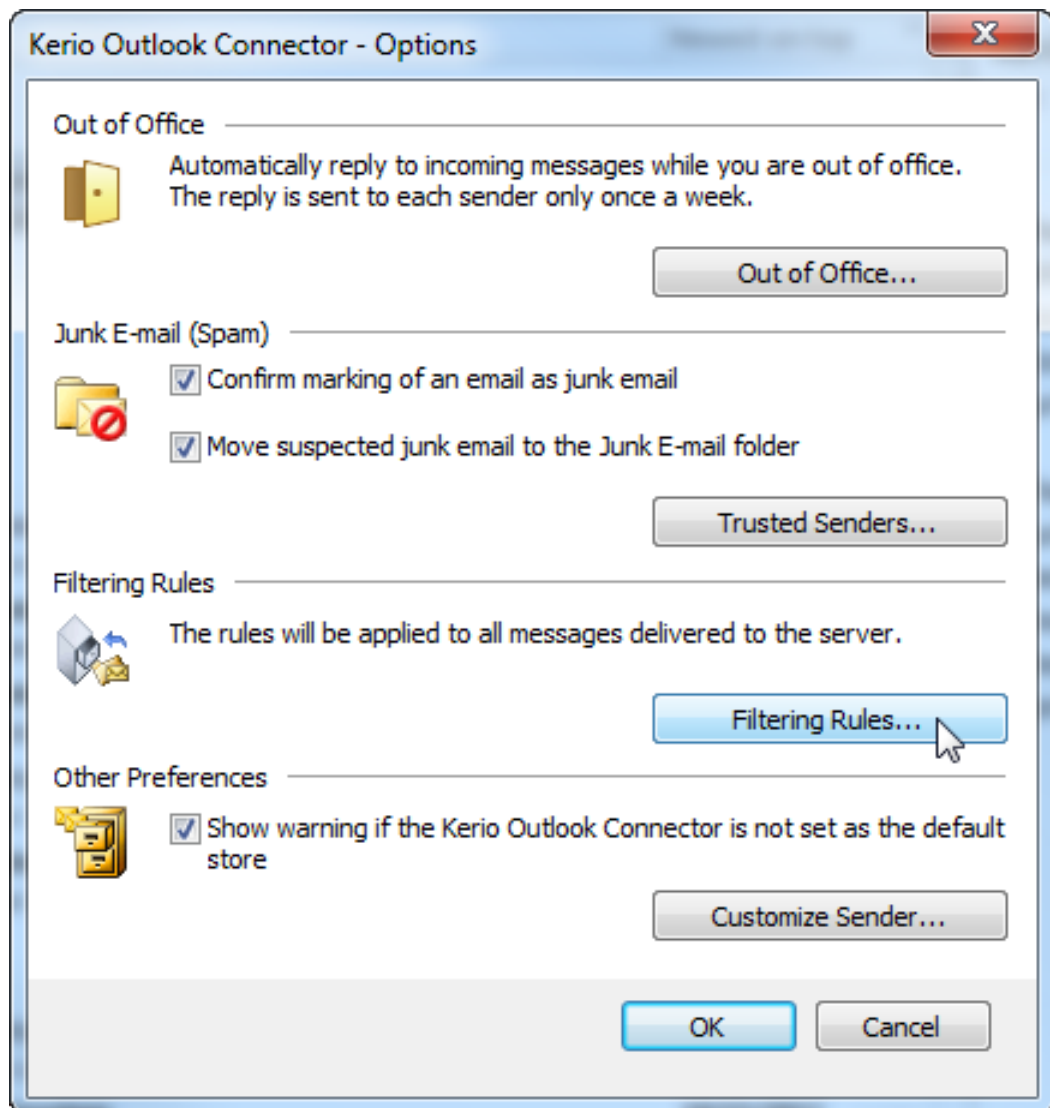
If you have additional folders, you can move messages:

- **manually** — drag messages to folders
- **automatically** — sort messages using filters

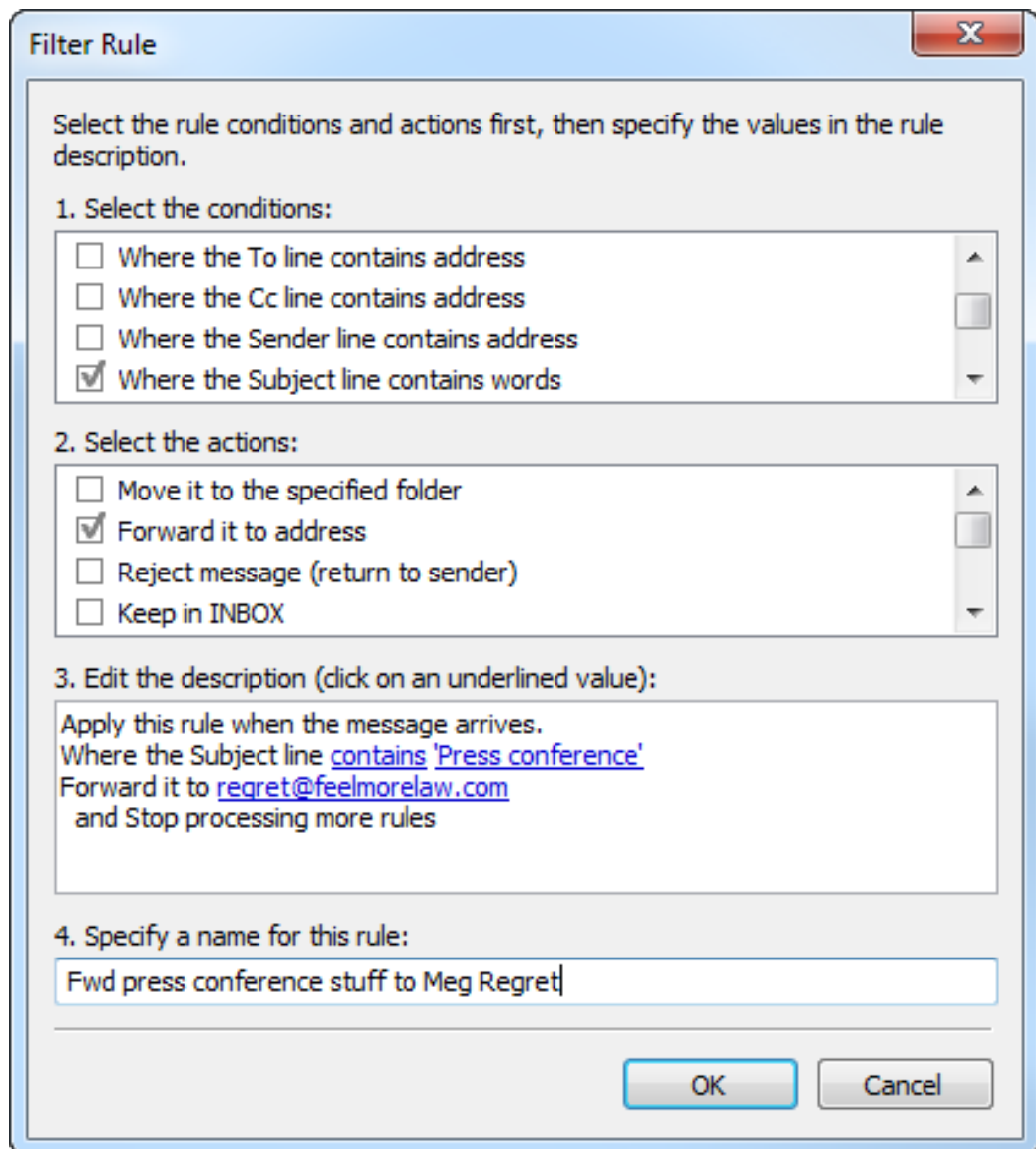
Creating filters

To sort messages to folders automatically, follow these steps to create filters:

1. In MS Outlook on tab Kerio Connect, click **Options**.
2. Click **Filtering Rules**.



3. Create new or edit existing rules.



Messages may comply with multiple rules. If you want messages to be filtered by the first rules which matches, select the **Stop processing more rules** option in the **Select the actions** section.

4. Click **OK**.

Rules are tested from the top downwards. Use the **Up** and **Down** buttons to move rules within the list.

Subscribing and sharing folders in Microsoft Outlook

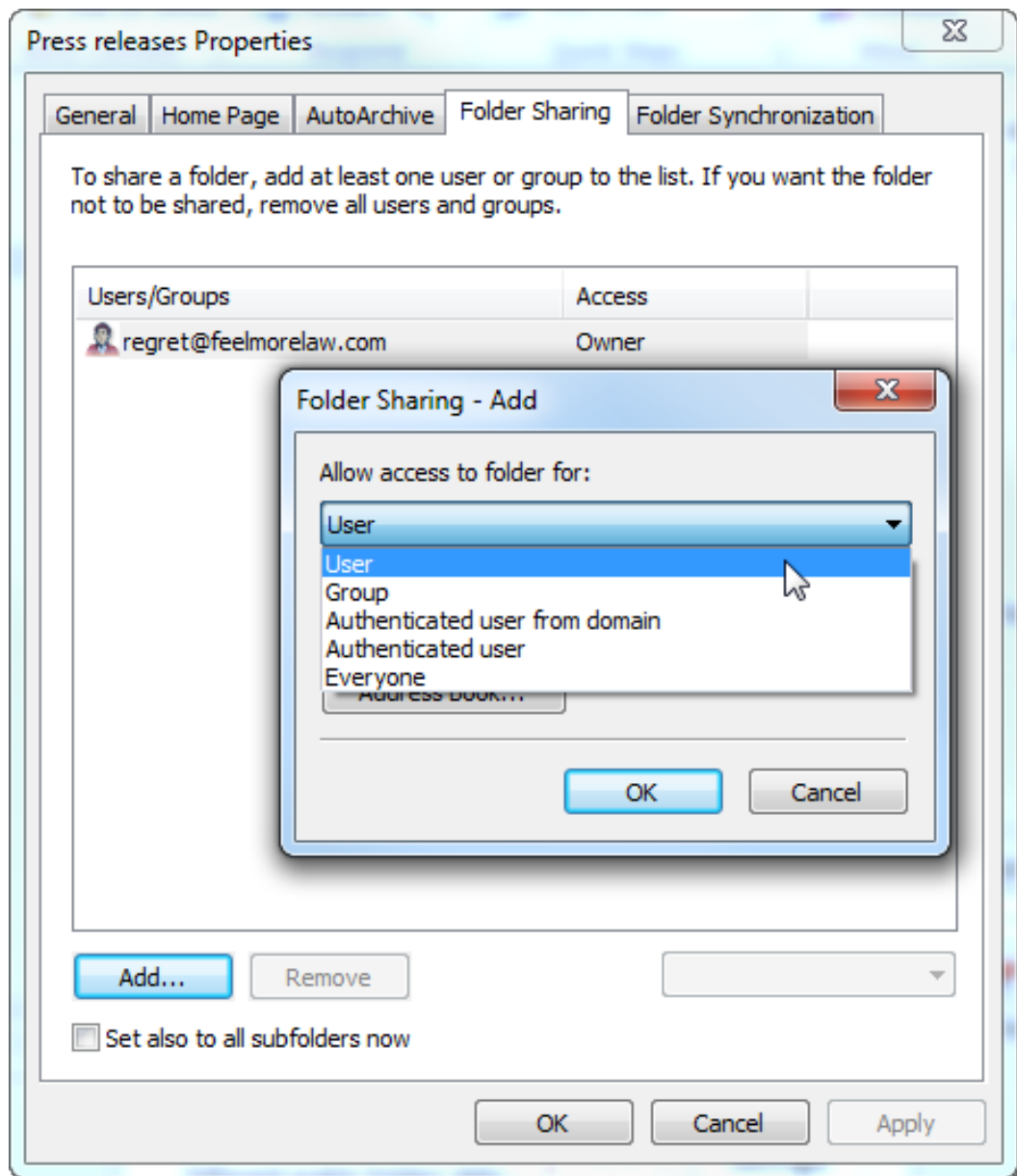
About sharing

In Microsoft Outlook with Kerio Outlook Connector, you can share any folder with other users. First, you assign sharing rights to users. Second, users subscribe to shared folders.

Sharing folders

1. In Microsoft Outlook, right-click a folder and select **Properties**.
2. In the Properties dialog, go to tab **Folder Sharing**.
3. Click the **Add** button.
4. In the **Folder Sharing - Add** dialog, select with whom to share the folder and type the email address.

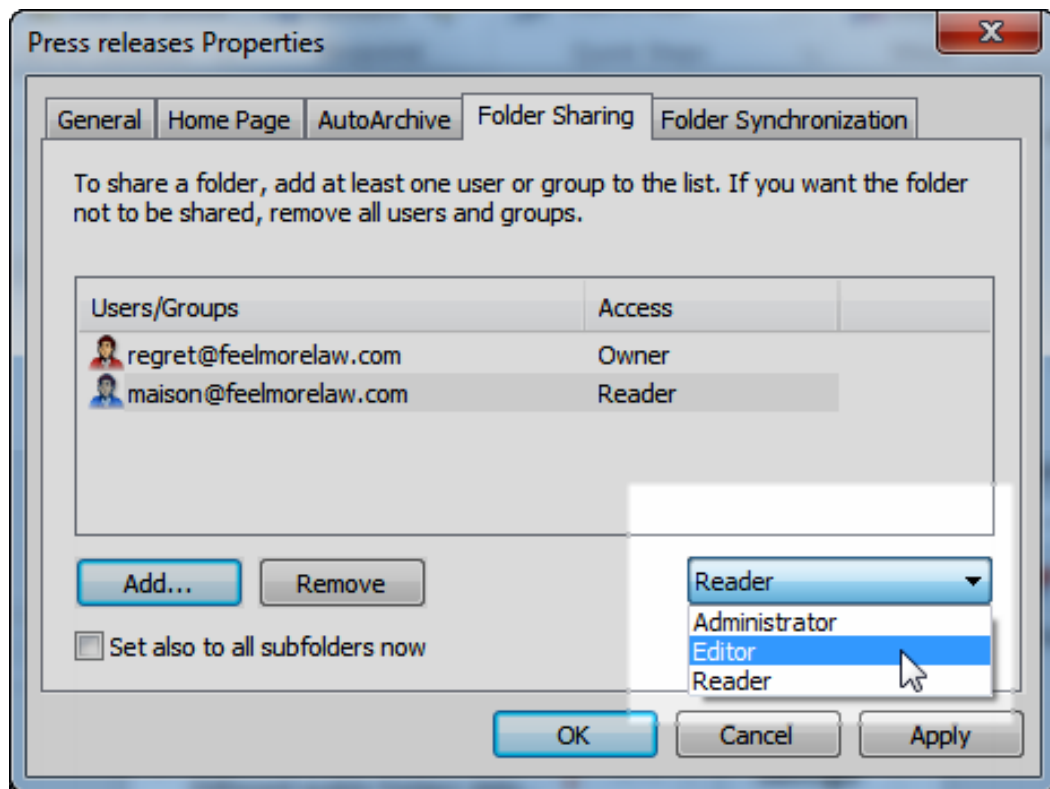
You can click **Address Book** to select from a list of users.



5. Click **OK**.
Kerio Connect assigns **Reader** rights by default.
6. Click **OK** to save the **Properties** dialog

Changing sharing rights

1. In Microsoft Outlook, right-click a folder and select **Properties**.
2. In the Properties dialog, go to tab **Folder Sharing**.
3. Click on a user and select the type of sharing rights from the drop-down menu.



4. Click **OK**.

Removing sharing

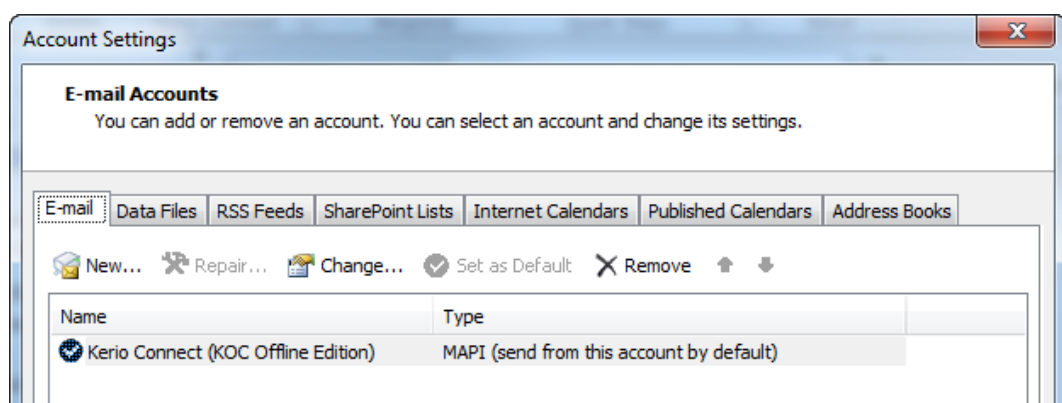
1. In Microsoft Outlook, right-click a folder and select **Properties**.
2. In the Properties dialog, go to tab **Folder Sharing**.
3. Select a user and click **Remove**.

Subscribing to shared folders

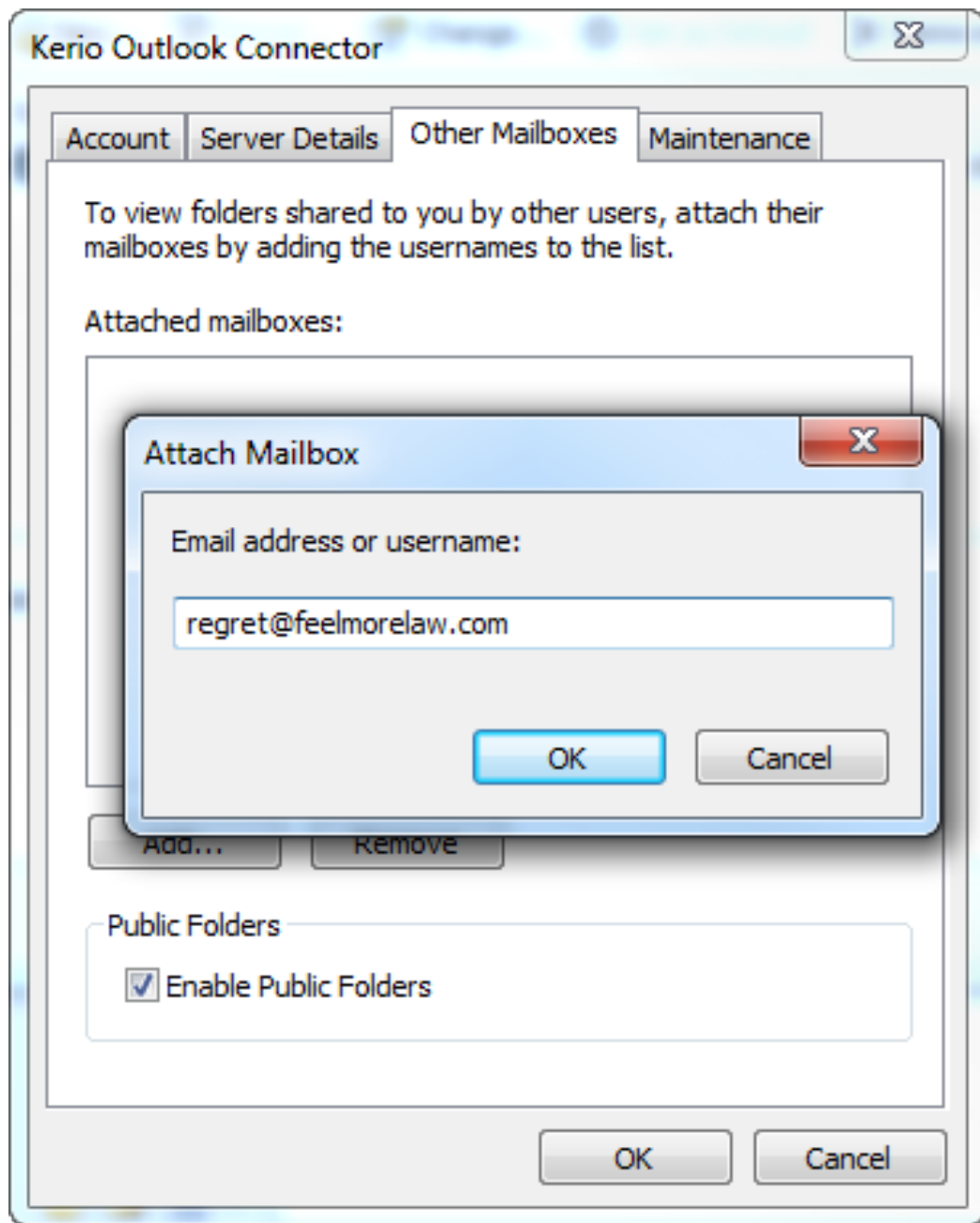
Users can subscribe to shared folders by following these steps:

1. In Microsoft Outlook, go to **File** → **Account Settings**.
2. Double-click the Kerio Connect account.

Subscribing and sharing folders in Microsoft Outlook



3. Go to tab **Other Mailboxes** and click **Add**.
4. In the **Attach Mailbox** dialog, type the email address of the user who shares their folder with you.



5. Click **OK** and confirm the account settings.

Microsoft Outlook displays the shared folders in the tree under the user name of the folder owner.

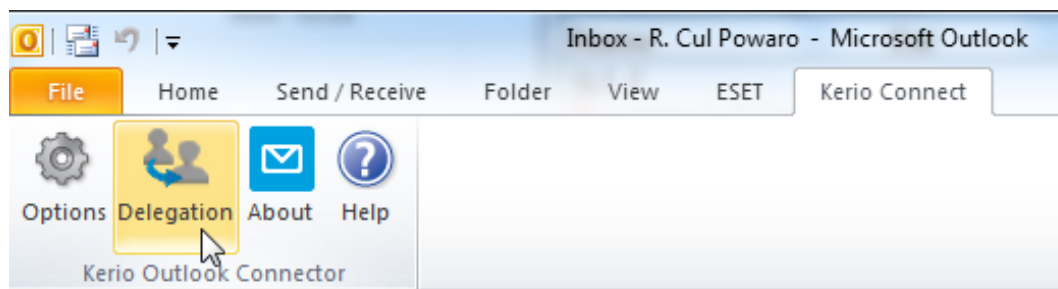
Using delegation in Microsoft Outlook with Kerio Outlook Connector

About delegation

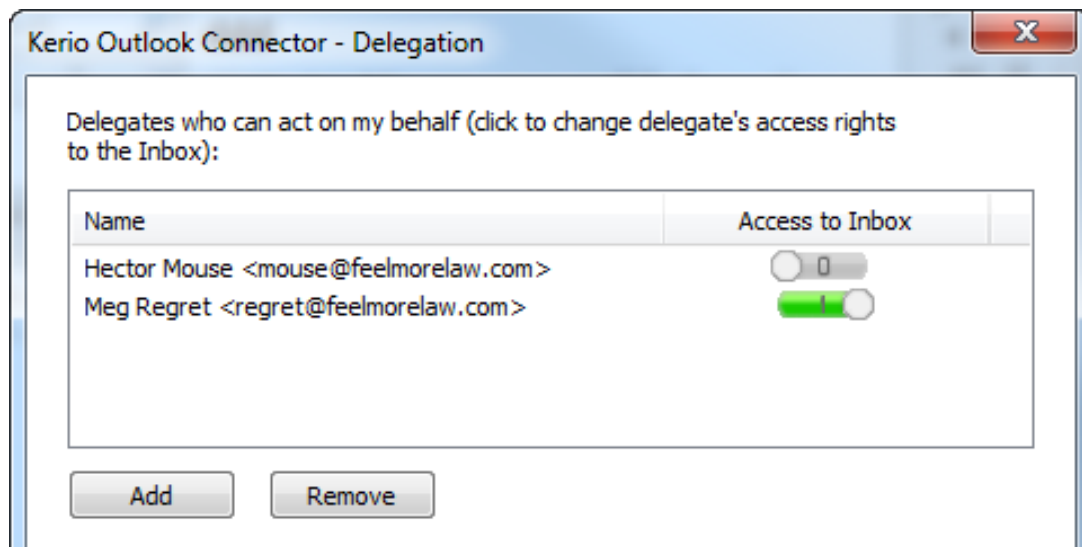
Delegation is an advanced typed of sharing. A **delegate** can act on your behalf. A **delegate** can act on your behalf — they can send/confirm your event invitations, and/or send/receive your messages.

Delegating users

1. Sign in to your profile in Microsoft Outlook and go to tab **Kerio Connect**.
2. Go to section **Delegation**.



3. Click **Add** under the **Delegates who can act on my behalf** box and select delegates.
4. By default, you allow delegates access to your calendar and Inbox. Click the switch button next to the delegates name to disable acces to your Inbox (delegates can only send and accept event invitations).



5. Save the settings.

You can delegate as many users as you wish.

The delegates can now see your Inbox/Calendar in Microsoft Outlook and can act on your behalf.

▶ Favorites

▲ Meg Regret

-  **Inbox** (3)
-  **Drafts** (1)
-  **Sent Items**
-  **Deleted Items**
-  **Infected Items**
-  **Junk E-mail** (2)
-  **Outbox**
-  **RSS Feeds**
-  **Search Folders**

▶ Public Folders

▲ R. Cul Powaro

-  **Deleted Items**
-  **INBOX** (3)
-  **Search Folders**

Selecting from which address to send messages in Microsoft Outlook

Overview

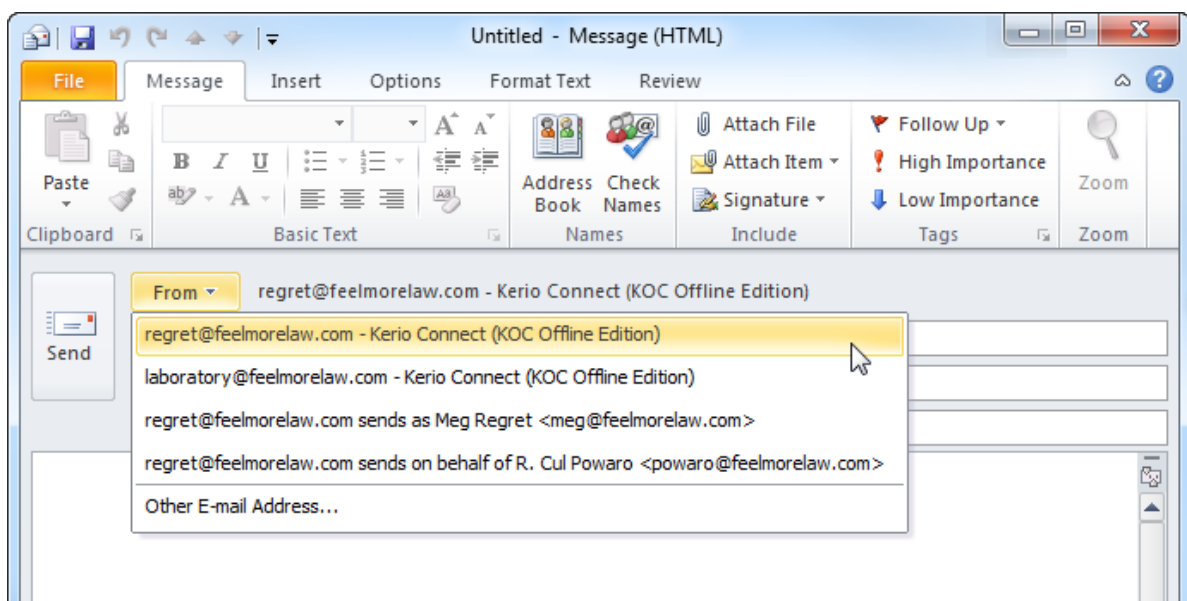
With Kerio Outlook Connector 8.3 and newer, you can now select from which address you send messages in Microsoft Outlook.

The addresses from which you can choose from include:

- your email address
- all your [aliases](#)
- addresses from [all accounts in your profiles](#)
- address of people [you are a delegate of](#)

Selecting the From address

1. Open your profile in Microsoft Outlook.
2. Click **New E-mail**.
3. Click the **From** button and select an address.



Now you can compose the message and send it from your selected address.

Using alternating email addresses when scheduling events

Overview



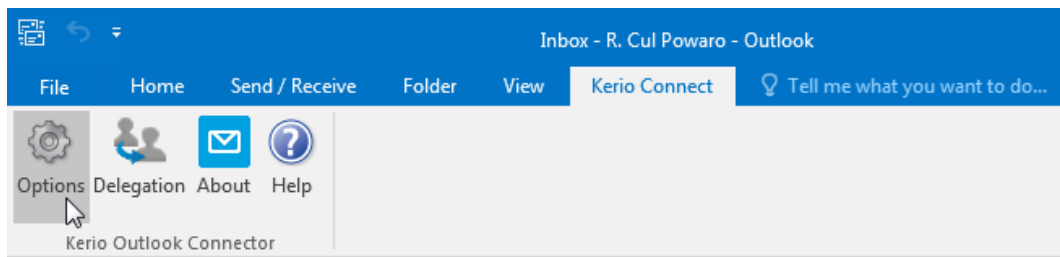
New in Kerio Connect 9.0.2!

If users have multiple email addresses, you can use any of them when scheduling events in Microsoft Outlook without duplicating events in your calendar.

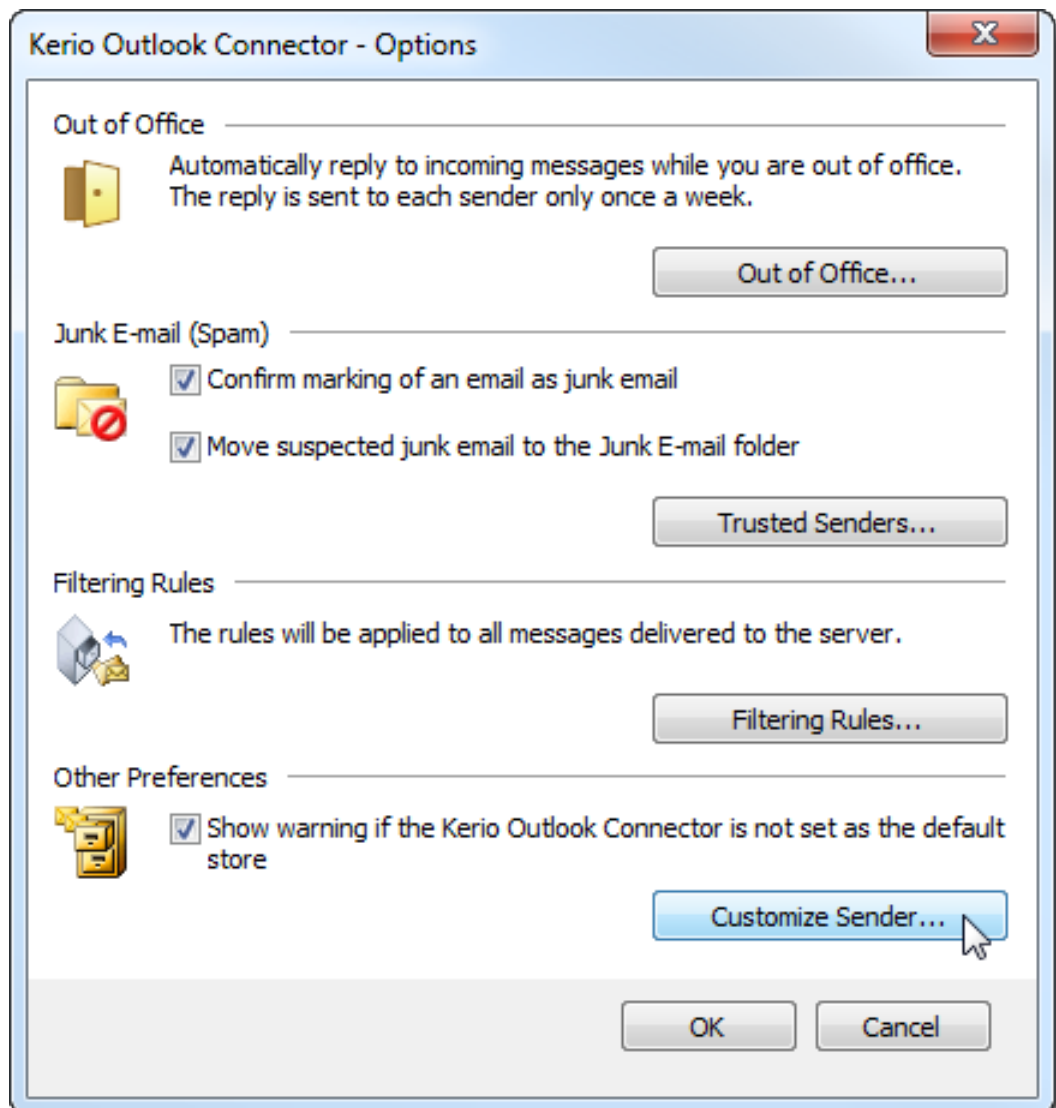
Adding an alternative address to Microsoft Outlook

To use an alternative email address for scheduling events, users must specify this address in their Kerio Outlook Connector:

1. Open Microsoft Outlook.
2. On the Kerio Connect tab, click **Options**.



3. Click **Customize Sender**.



4. In the **Email address** field, type the email address to use for scheduling.

Customize Sender

User Information

Name: R. Cul Powaro

Email address: powaro@feelmorrelaw.com

Custom Settings

Name:

Email address: rculpowaro@feelmorrelaw.com

☐ Use this address for meeting organization

5. Click **OK**.

Now all your events use the specified email address.