



User Guide – Email Hosting Upgrade to Exchange 2016 – Webmail and POP / IMAP

Document Updated February 2017

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Introduction

Use the following instructions to ensure you have uninterrupted access to your email both from your Desktop Client and from your mobile device(s).

Need this information later? Have another question? The Smarsh Exchange 2016 Knowledge Base information regarding POP/IMAP Mailboxes can be found [here](#). Bookmark it for easy reference!

Please do not perform any of the steps in this guide until YOUR mailbox has been upgraded.

Tip: Save a copy of these instructions to your desktop for reference following the upgrade of your email account. Please be mindful of the environment when considering printing this guide.

Start Here! Quick-Start Information

You may have noticed that this guide is not short. Due to the proliferation of operating systems and mail applications, we must provide instructions for all common configurations.

You don't need to read every single page to complete your basic configuration, just the sections that are relevant to **your** individual setup!

And with that, let's start our adventure! Use the links below for handy reference, or start with **Step 1** and use the links inline to choose your own adventure.

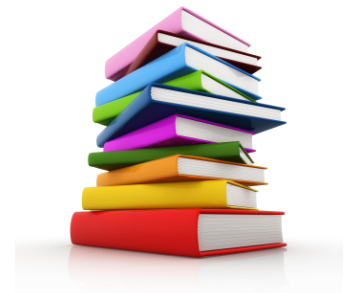
- [Step 1: Bookmark Webmail/OWA](#)
- [Step 2: Identify your current configuration](#). Click the link under your configuration to get to...
- [Step 3: Make configuration changes for your primary email application](#) (example: Outlook). Click the link under the configuration instructions to lead you to...
- [Step 4: Make configuration changes for your mobile devices](#)

Details for these steps are covered in depth in corresponding sections.

Additional Information

The following subjects are covered as appendices to this guide. Please review if necessary for your individual configuration:

- [Appendix 1](#): Basic POP and IMAP Settings for other mail clients besides Outlook and Apple Mail.
- [Appendix 2](#): Instructions to set up a POP connection for a mailbox that was previously configured with a POP connection for Outlook and Apple Mail (this is not the recommended configuration).



Step 1: Bookmark Webmail/OWA

What has previously been known as Webmail is now known as OWA (Outlook Web Access) or Outlook on the Web. **Your email is now accessible at www.smarshmail.com. Please add this URL to your bookmarks for easy access!**

Note: You may not see everything in webmail that you see on your computer if POP/SMTP has been historically configured to remove data from the server periodically.

Step 2: Identify Your Current Configuration

Identifying your current email configuration will ensure a smooth transition to Exchange 2016. Use the below guidelines to identify your current configuration. To learn about the different connection types, please [click here](#). If you're unsure which version of Outlook you are currently using, please [click here](#) to identify the specific version.

Webmail or OWA Only

If you currently access your email via a web browser only, you are a webmail or OWA only user. [Continue to Step 3.](#)

POP or IMAP Users

If you have a mail program such as Microsoft Outlook or Apple Mail configured, you are either utilizing a POP or IMAP connection. To identify which type of connection you are currently using, please follow the steps as outlined below for your specific computer operating system and email program.

If you currently utilize a version of Outlook prior to Outlook 2007, please contact Smarsh Support for assistance determining your current configuration.

Once you have identified the current configuration of your Smarsh Hosted Email Services, please click the appropriate link to view the associated configuration instructions. **Smarsh recommends all basic POP/IMAP email accounts be provisioned via IMAP, regardless of your previous configuration.**

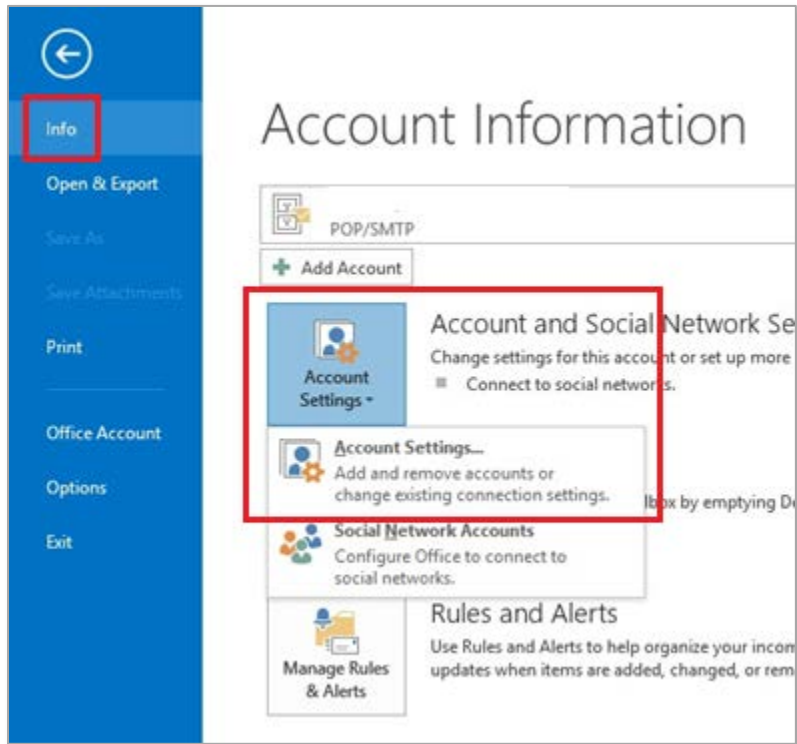
Click on the link below that matches your specific computer email software configuration. If you utilize a piece of software for email that is not on this list, please contact Smarsh Support or visit our knowledge base online [here](#).

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Find Your Configuration: Microsoft Outlook 2013 and Outlook 2016 (Windows)	5
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Apple Mac OS X.....	8
Find Your Configuration: Microsoft Outlook for Mac (Outlook 2016) :	8
Find Your Configuration: Microsoft Outlook for Mac (Outlook 2011) :	9
Find Your Configuration: Apple Mail (OS X 10.6+) :	10

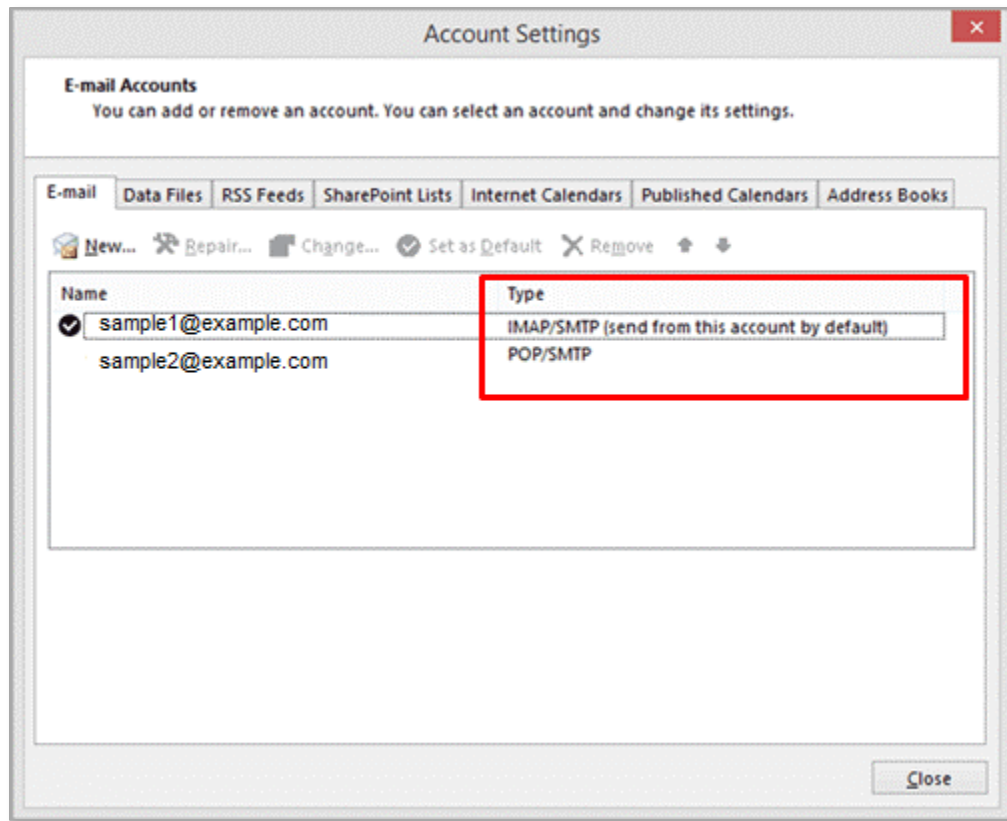
Windows 7/8/10

Find Your Configuration: Microsoft Outlook 2013 and Outlook 2016 (Windows)

- Click on **Info** and then **Account Settings**.



- Identify whether your Smarsh Hosted Email Account Type is configured as **IMAP/SMTP** or **POP/SMTP**.

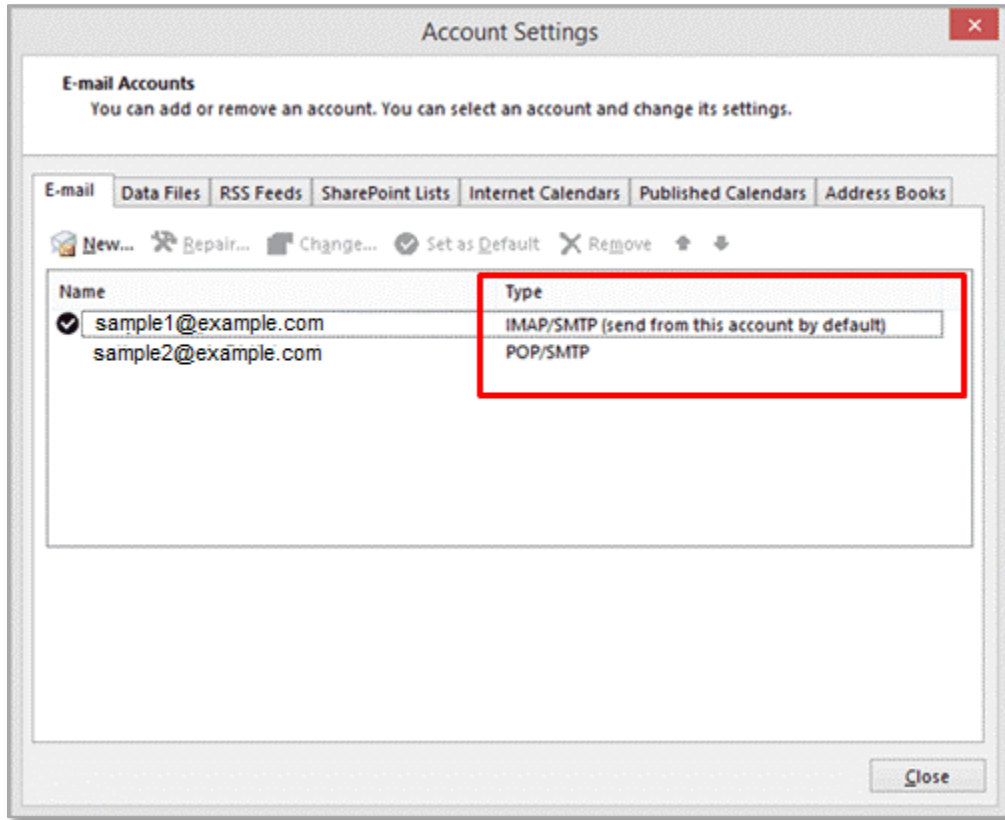


Continue to **Step 3** to make configuration changes in Outlook:

- If you currently use **POP/SMTP** with **Outlook 2013** or **Outlook 2016**, [click here](#).
- If you currently use **IMAP/SMTP** with **Outlook 2013** or **Outlook 2016**, [click here](#).

Find Your Configuration: Microsoft Outlook 2007 and Outlook 2010 (Windows):

- Click on your mailbox and select **Account Properties**, then **Account Settings**.
- Identify whether your Smarsh Hosted Email Account Type is configured as **IMAP/SMTP** or **POP/SMTP**.



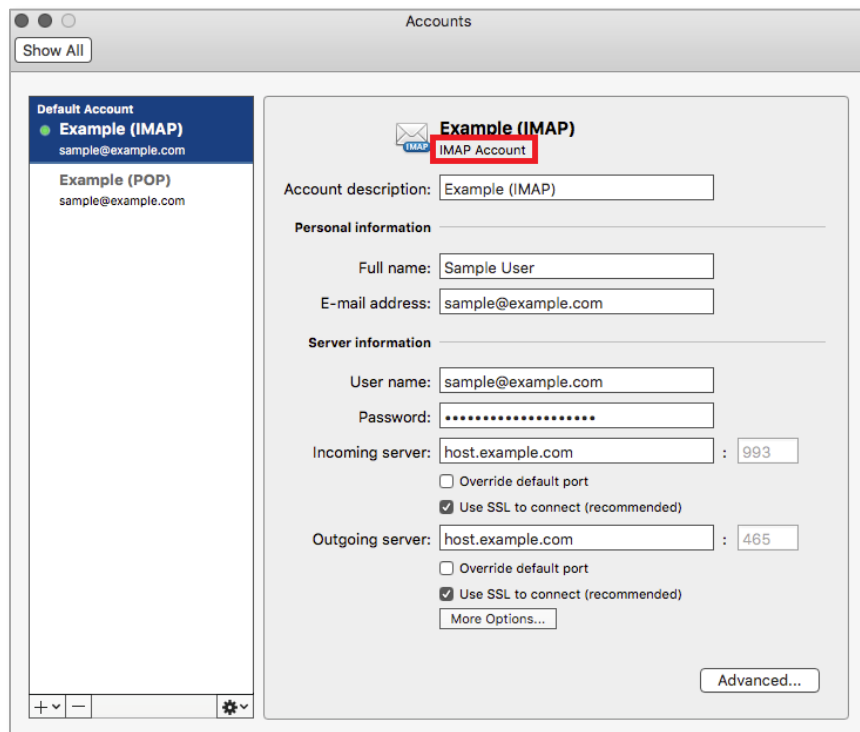
Continue to **Step 3** to make configuration changes in Outlook:

- If you currently use **POP/SMTP** with **Outlook 2010**, [click here](#).
- If you currently use **POP/SMTP** with **Outlook 2007**, [click here](#).
- If you currently use **IMAP/SMTP** with **Outlook 2007** or **Outlook 2010**, [click here](#).

Apple Mac OS X

Find Your Configuration: Microsoft Outlook for Mac (Outlook 2016):

- In Outlook, click on **Tools** then select **Accounts**.
- **Select your email account** in the left-hand navigation bar.
- Identify whether your Smarsh Hosted Email account is configured as **IMAP** or **POP** via the text under the name of the Account.

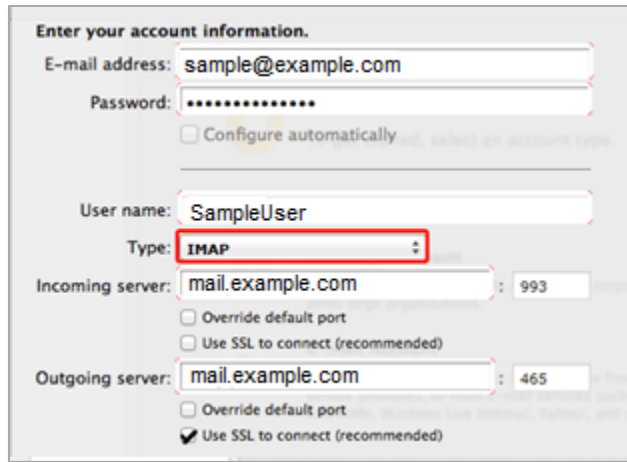


Continue to **Step 3** to make configuration changes in Outlook:

- If you currently have a **POP Account** with **Outlook 2016 (Apple)**, [click here](#).
- If you currently have an **IMAP Account** with **Outlook 2016 (Apple)**, [click here](#).

Find Your Configuration: Microsoft Outlook for Mac (Outlook 2011):

- In Outlook, click on **Tools** then select **Accounts**.
- **Double click on your email account** in the left-hand navigation bar.
- Identify whether your Smarsh Hosted Email account Type is set to **IMAP** or **POP**.



Enter your account information.

E-mail address: sample@example.com

Password: *****

☐ Configure automatically

User name: SampleUser

Type: **IMAP**

Incoming server: mail.example.com : 993

☐ Override default port

☐ Use SSL to connect (recommended)

Outgoing server: mail.example.com : 465

☐ Override default port

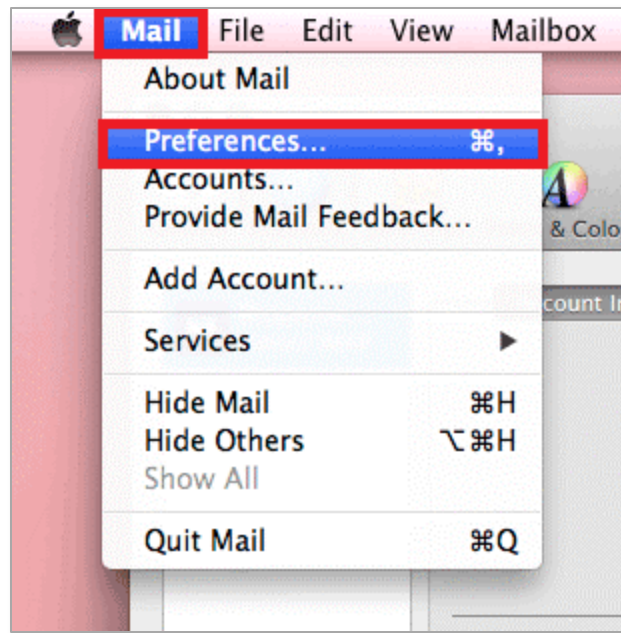
☒ Use SSL to connect (recommended)

Continue to **Step 3** to make configuration changes in Outlook:

- If you currently have a **POP** account with **Outlook 2011 (Apple)**, [click here](#).
- If you currently have an **IMAP** account with **Outlook 2011 (Apple)**, [click here](#).

Find Your Configuration: Apple Mail (OS X 10.6+):

- To identify the current server settings, click on **Mail** and select **Preferences**.



- Select the **Accounts** tab. Select your Smarsh Hosted Email account. Under **Account information** identify the **Account Type** as **IMAP** or **POP**.

Continue to **Step 3** to make configuration changes in Outlook:

- If you currently have a **POP** account with Apple Mail, [click here](#).
- If you currently have an **IMAP** account with Apple Mail, [click here](#).

Step 3: Make Configuration Changes to Primary Email Application

Which instructions you follow will depend on your previous configuration. Unless you utilize multiple computers, you should only need to follow one set of instructions: The instructions that correspond with your previous and future configurations.

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Webmail

If you currently access your email via a web browser only, you are webmail or OWA only user. The only configuration change you must make is to use a different link to access your email. Users that currently utilize webmail as their only connection to Smarsh Hosted Email Services can connect post-upgrade via www.smarshmail.com.

The following Webmail items will be migrated to the upgraded email hosting, and will be available immediately post-upgrade:

- Email
- Calendar items
- Contacts

Note: For Calendar entries that were scheduled before your upgrade, but occurring afterwards: While all meeting invite entries will be upgraded to Exchange 2016 post upgrade, if the details of the of the meetings are changed, the invitees will receive a NEW meeting invitation. In this case, invitees should accept the new meeting and ignore or remove the old entry. This scenario only impacts meetings that are on the user's calendar at the time of migration. Calendar entries/invites created in Exchange 2016 will not experience this issue.

The following Webmail items will not be migrated automatically:

- Notes
- Tasks
- Journals
- Signatures

To migrate these items, we recommend creating a word or text document, copying and pasting the content from your notes, tasks, journals and signatures, and then manually recreating these entries once your upgrade is complete.

Continue to Step 4: [Configure your Mobile Device\(s\)](#)

Post-Upgrade: POP to IMAP

Microsoft Windows 7/8/10

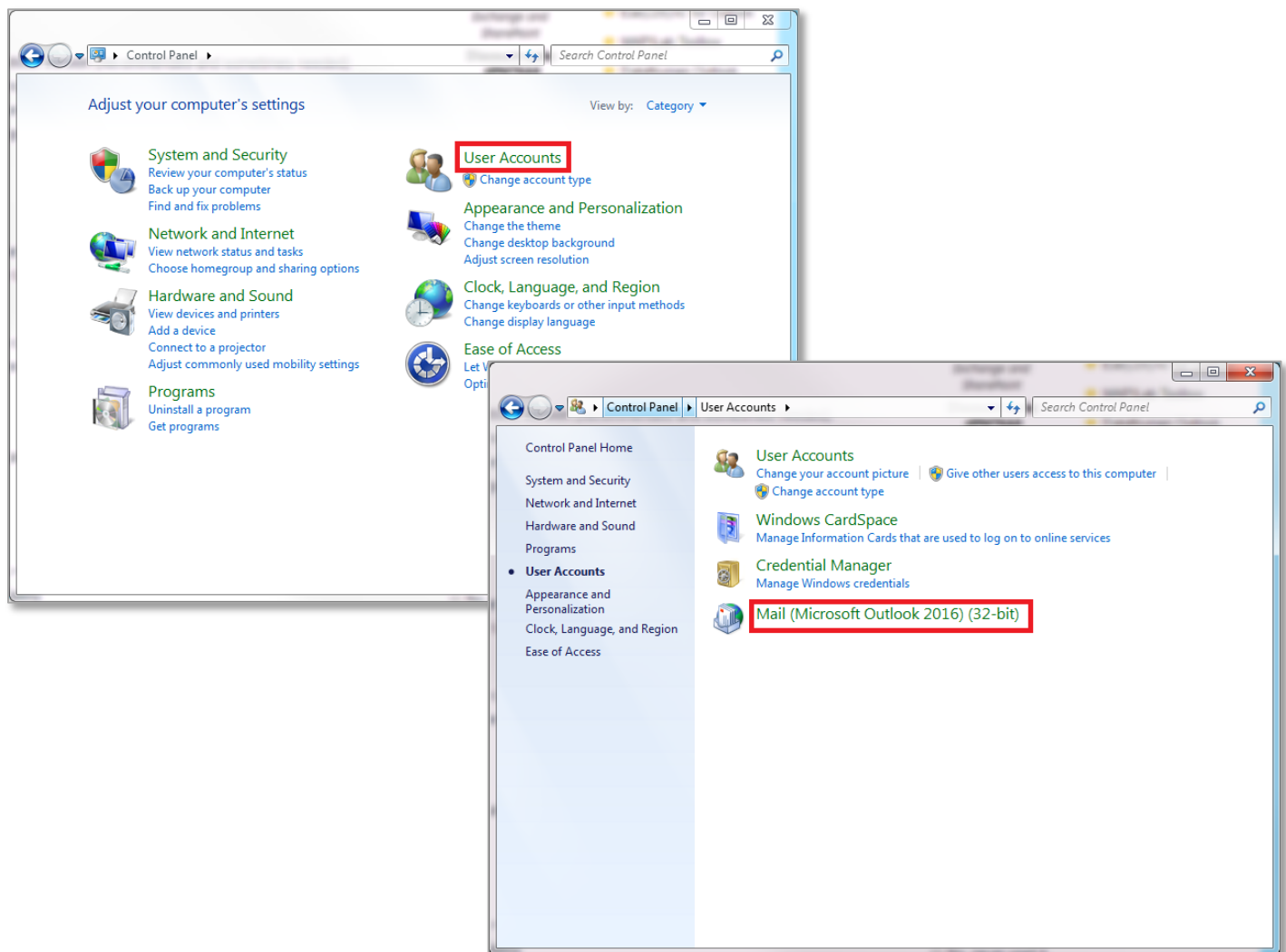
POP to IMAP: Outlook 2013/2016 (Windows)

These instructions will guide you to:

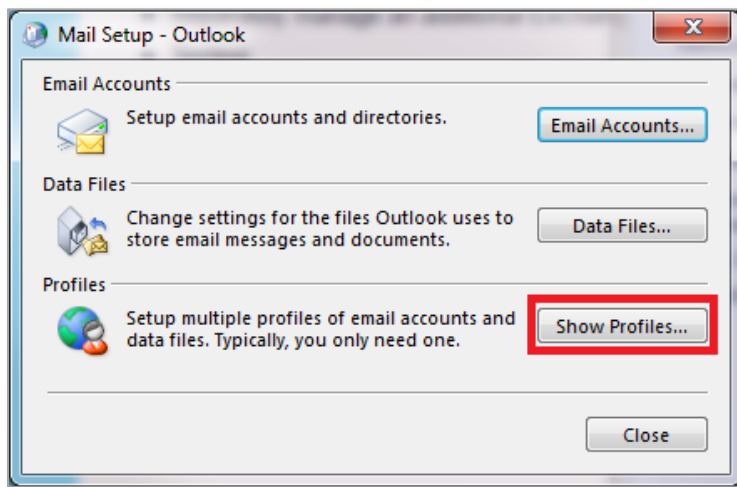
- Create a new Outlook profile
- Export data from your old Outlook profile
- Import data to the new Outlook profile
- Set your new profile as default

Provision a New Outlook Profile

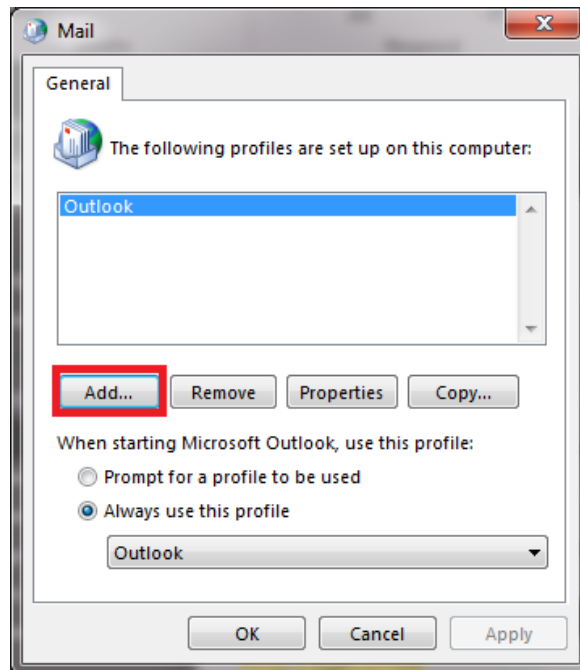
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



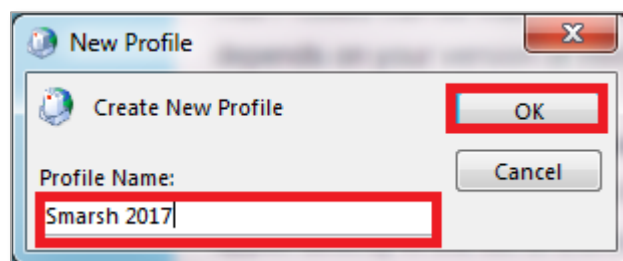
- Once the Mail Setup page appears, select **Show Profiles**.



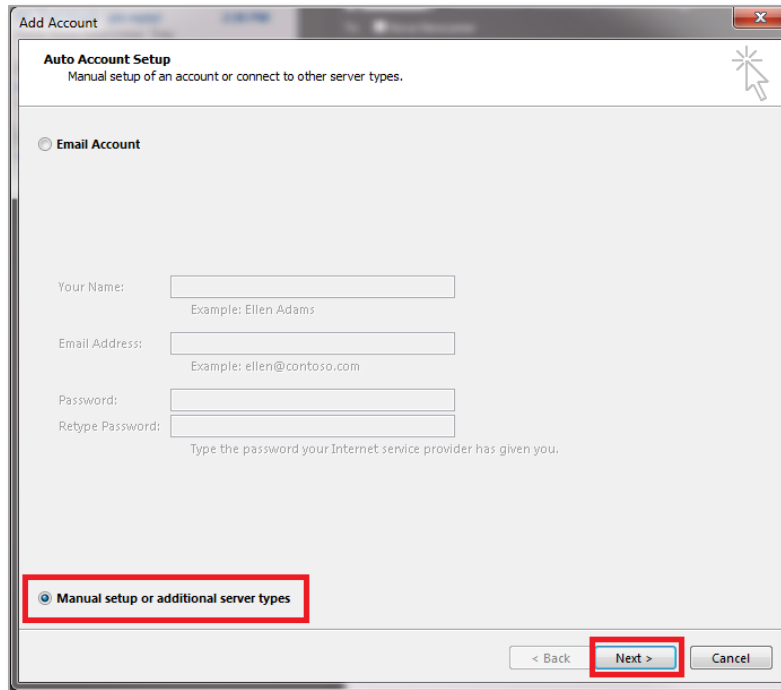
- In the Mail window, click **Add** to create a new Outlook Profile.



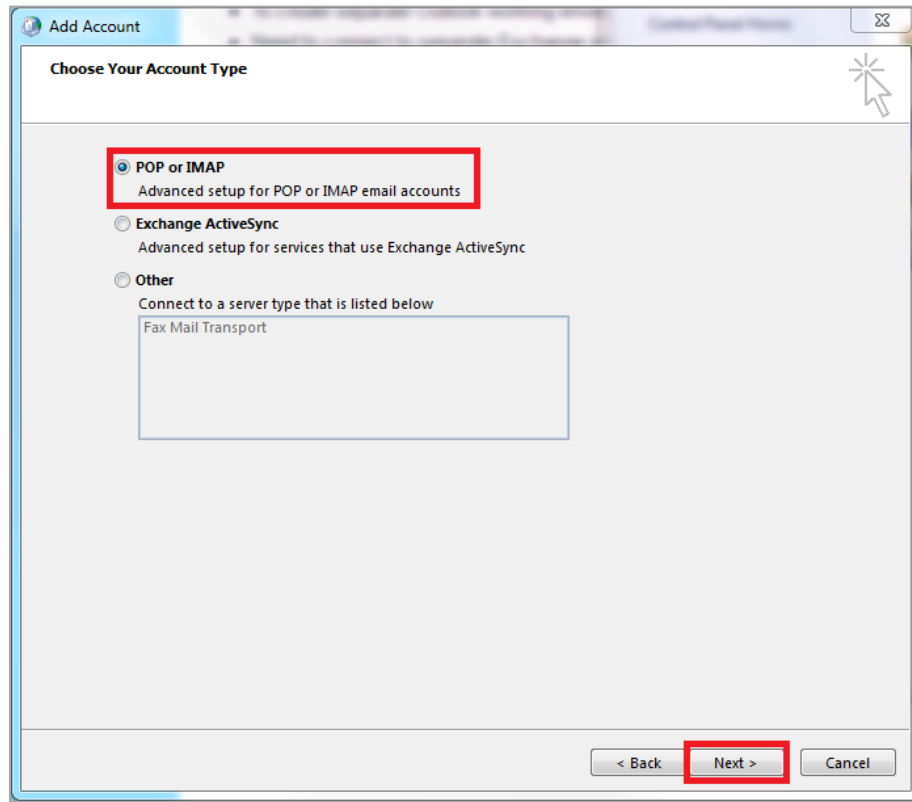
- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, the Email Account radio button will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.

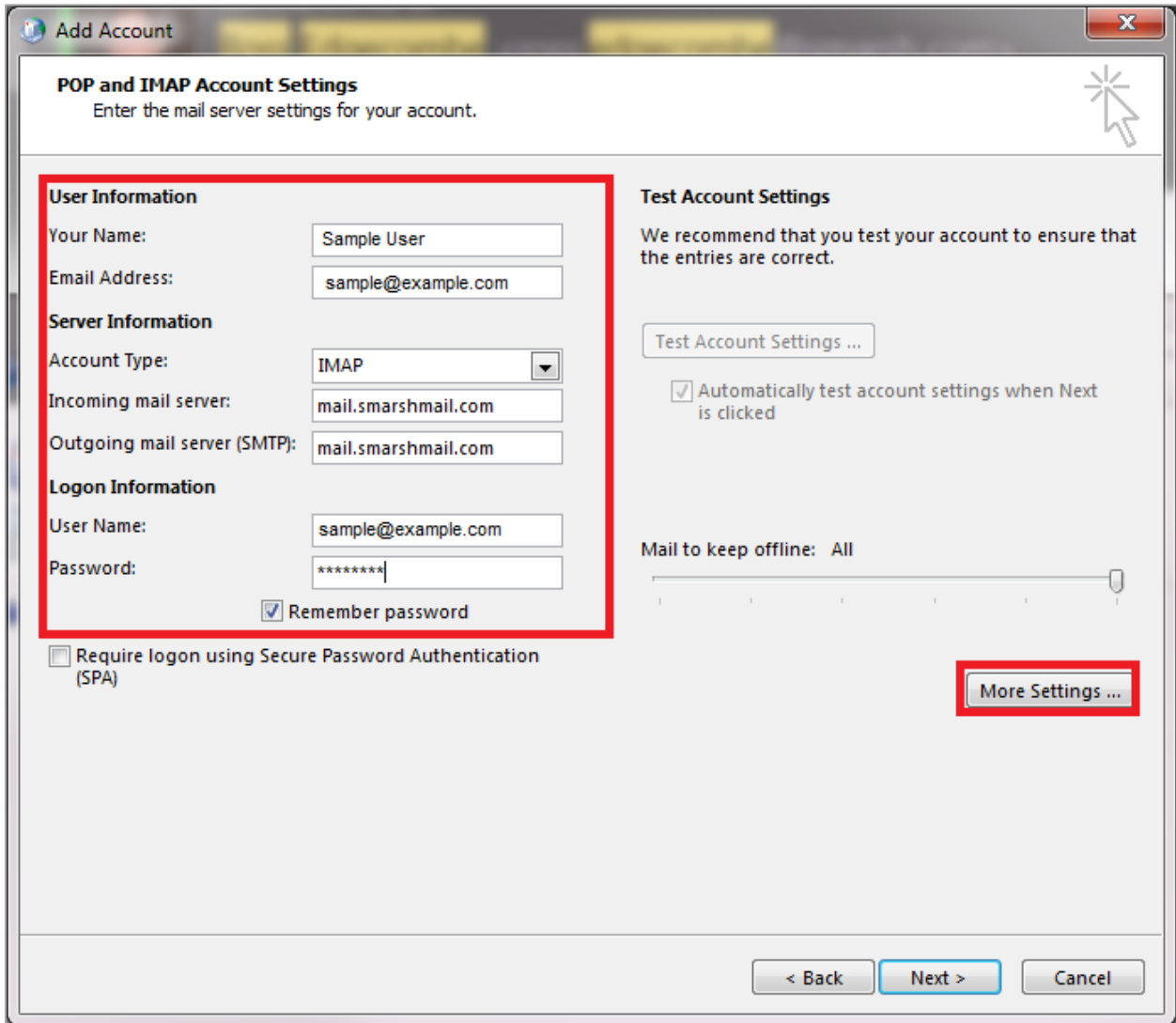


- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your newly upgraded email address in to the **Email Address** field (the email address will not have changed due to the upgrade).
 - Change the **Account Type** selection from POP3 to **IMAP**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should not have changed with the upgrade).

- Once the above details have been selected and entered, click **More Settings**.



Add Account

POP and IMAP Account Settings
Enter the mail server settings for your account.

User Information

Your Name:

Email Address:

Server Information

Account Type:

Incoming mail server:

Outgoing mail server (SMTP):

Ligon Information

User Name:

Password:

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings

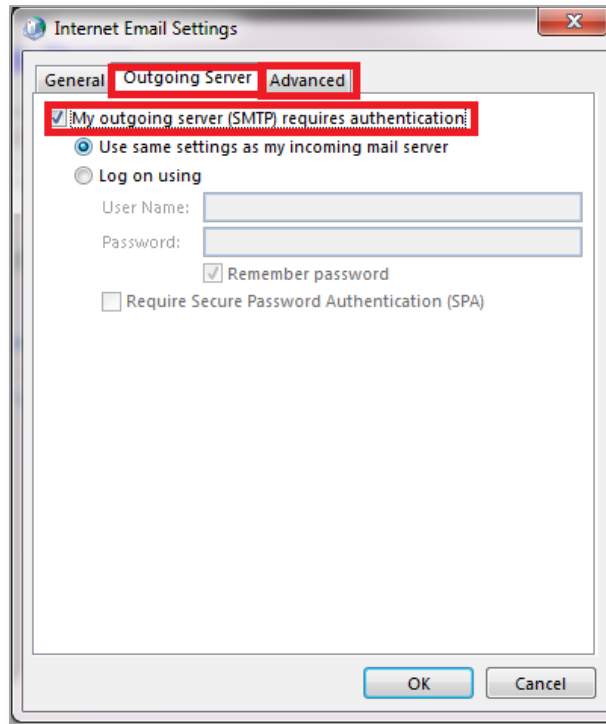
We recommend that you test your account to ensure that the entries are correct.

☒ Automatically test account settings when Next is clicked

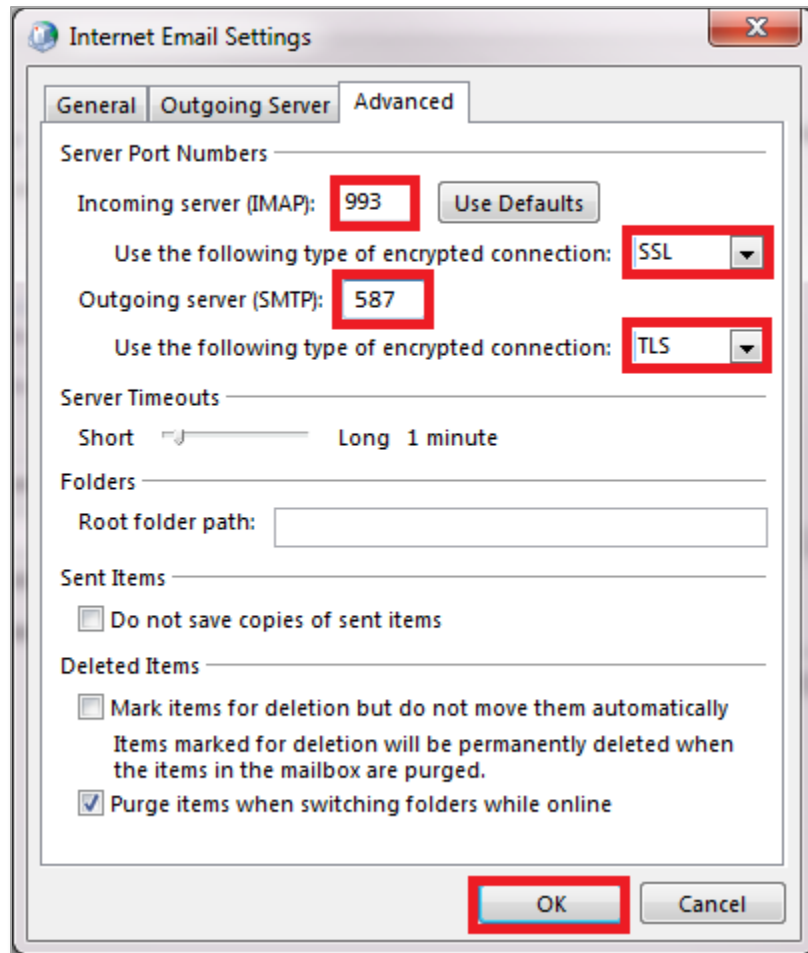
Mail to keep offline: All

< Back Next > Cancel

- In the Internet Email Settings window, select the **Outgoing Server** Tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be selected by default. Click the **Advanced** tab.

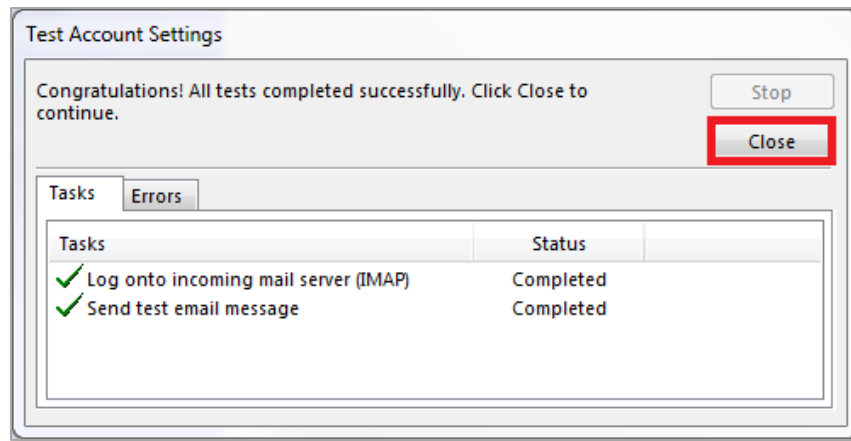


- In the Internet Email Settings window under the **Advanced** tab, complete the following changes:
 - In the **Incoming server (IMAP)** field, enter **993**.
 - In the **Use the following type of encrypted connection** field, select **SSL**.
 - In the **Outgoing server (SMTP)** field, enter **587**.
 - In the **Use the following type of encrypted connection** field, select **TLS**.

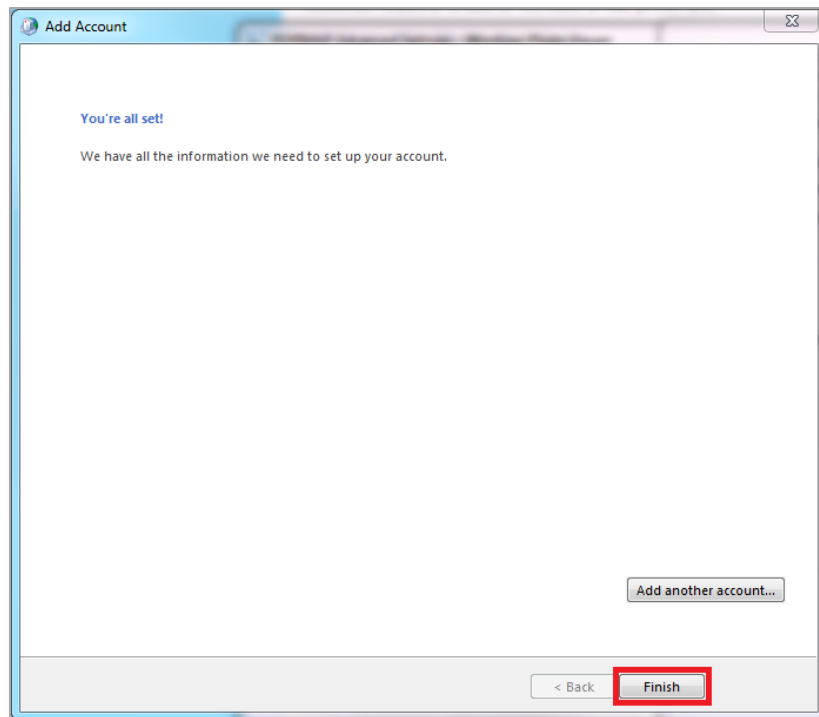


- Once the above details have been selected and entered, click **OK**.

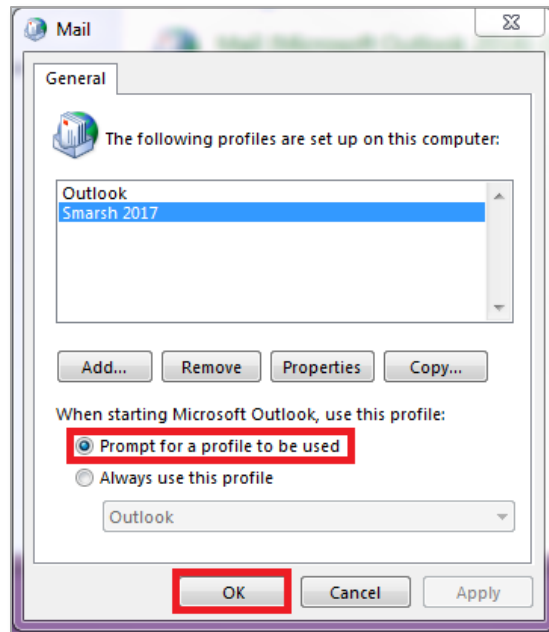
- On the Add Account window, click **Next**. Windows will now attempt to log on to the incoming mail server (IMAP) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.



- If the tasks do not complete successfully, consider returning to the previous screen and confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



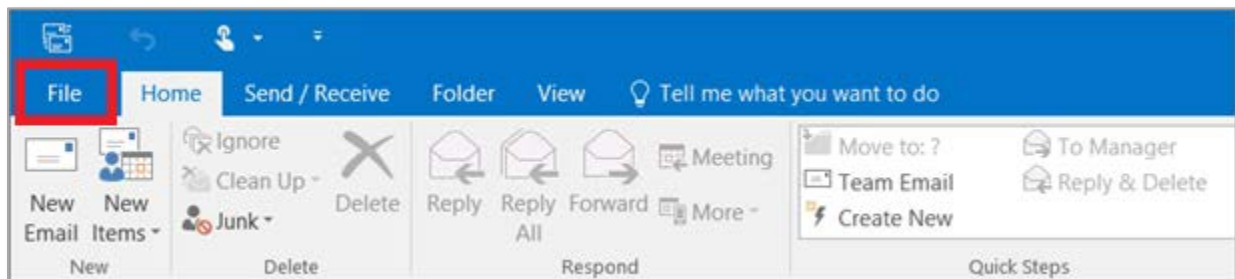
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure the **Prompt for a profile to be used** radio button is selected and click **OK**.



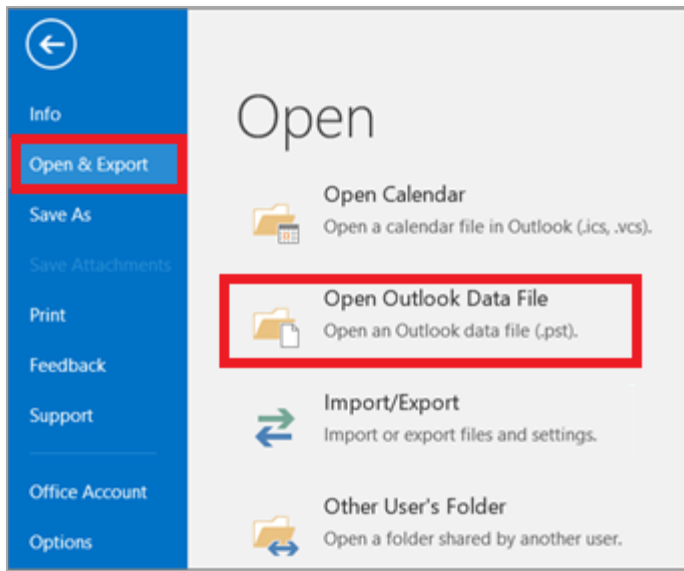
- Once all email data has been verified to be intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** is selected from the dropdown.

Connect PST Data to Outlook

- Start Outlook.** The Choose Profile window will appear. **Select your new profile** from the Profile Name dropdown and click **OK**.
- At the top of your Outlook ribbon, choose **File**.



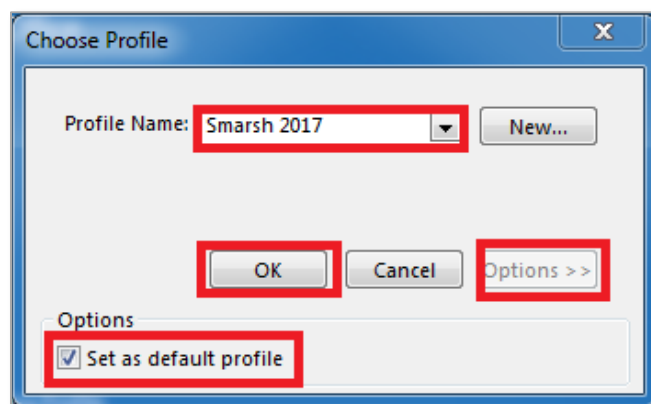
- Choose **Open & Export > Open Outlook Data File**



- Outlook will look for .pst files on your computer. **Select the .pst for your old profile** and click **Open**.
 - If you are unable to locate the .pst file associated with your old profile, [click here](#) for help on locating Outlook Data Files. Still having trouble? [Click here](#) to learn more about opening Outlook Data Files.
- Once opened, the **data from your old profile is accessible in Outlook via the left-hand navigation bar**.
- Quit Outlook** and continue to the next step.

Set Your New Outlook Profile as Default

- Start Outlook**; the Choose Profile window will appear. **Select your new profile from the Profile Name dropdown** and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

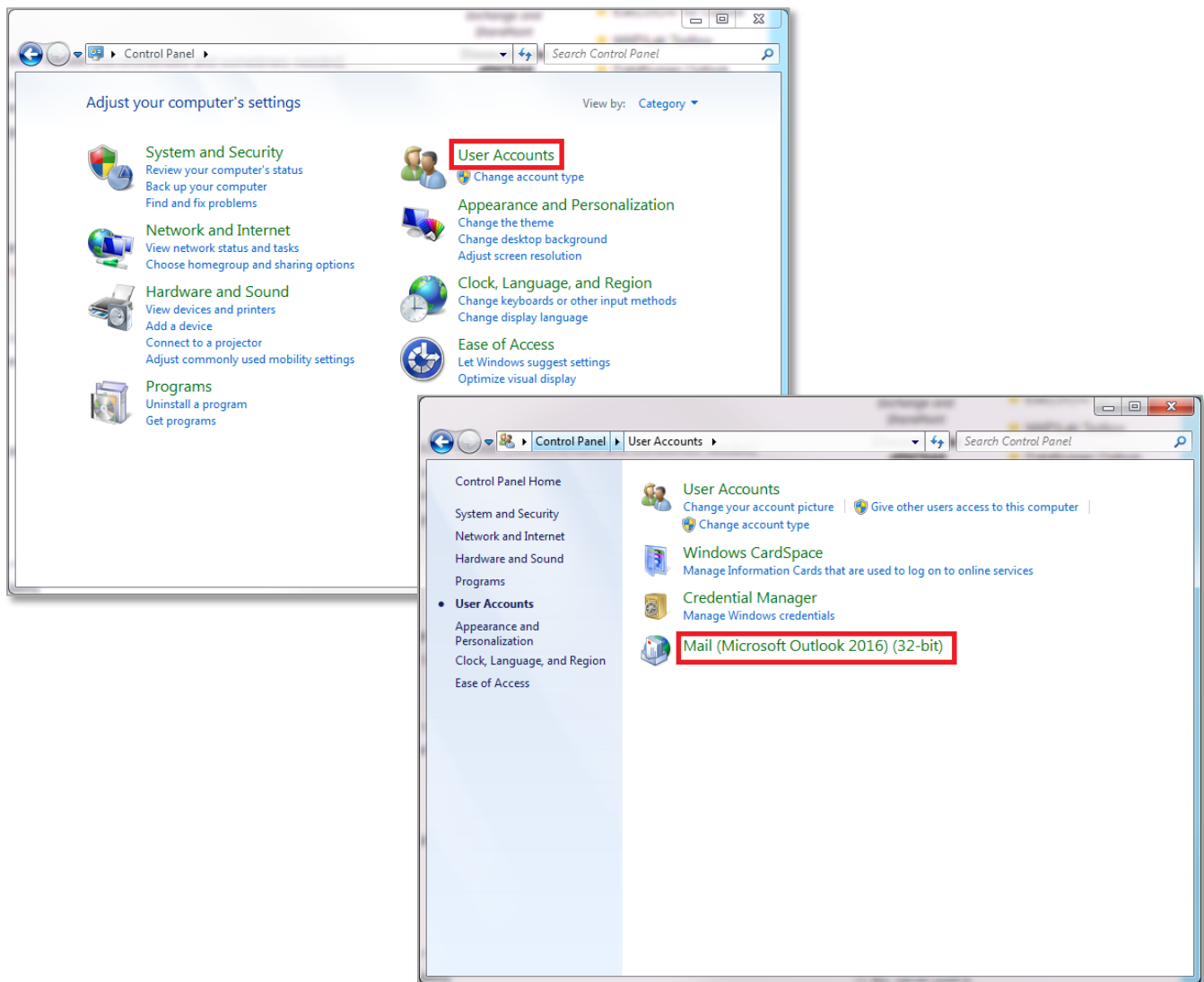
POP to IMAP: Outlook 2010

These instructions will guide you to:

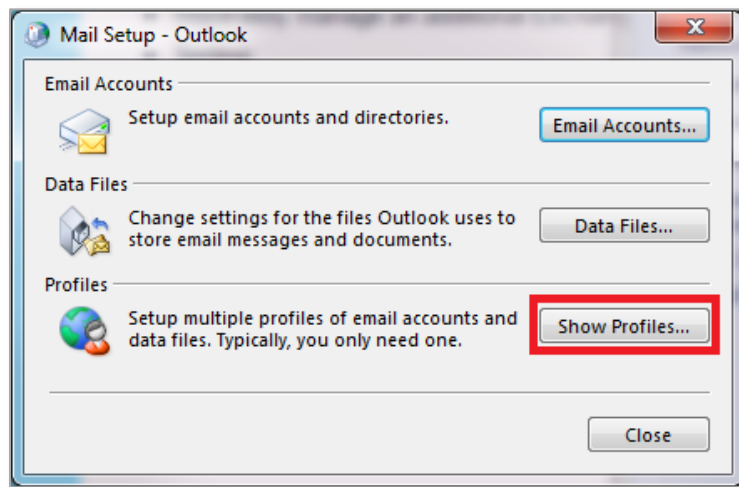
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Provision a New Outlook Profile

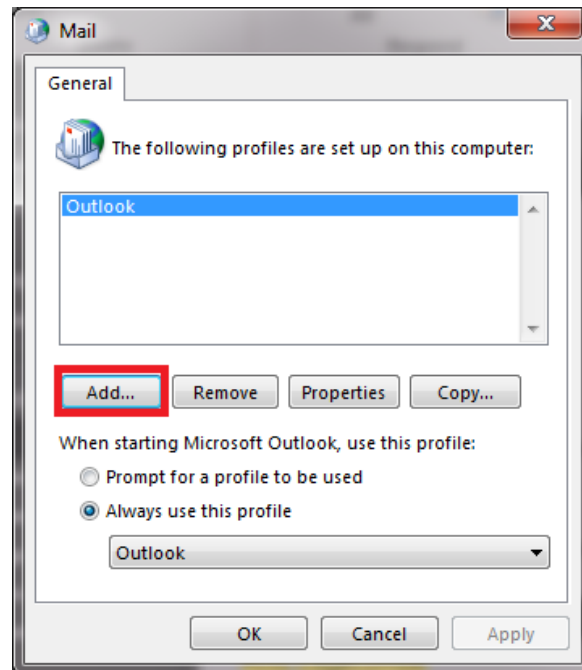
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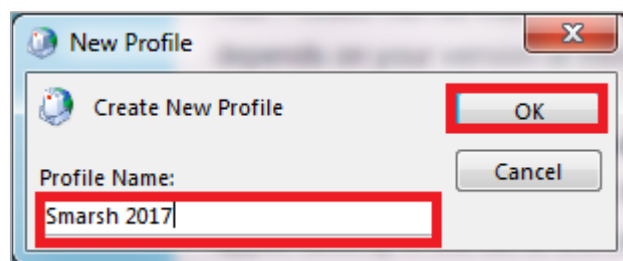
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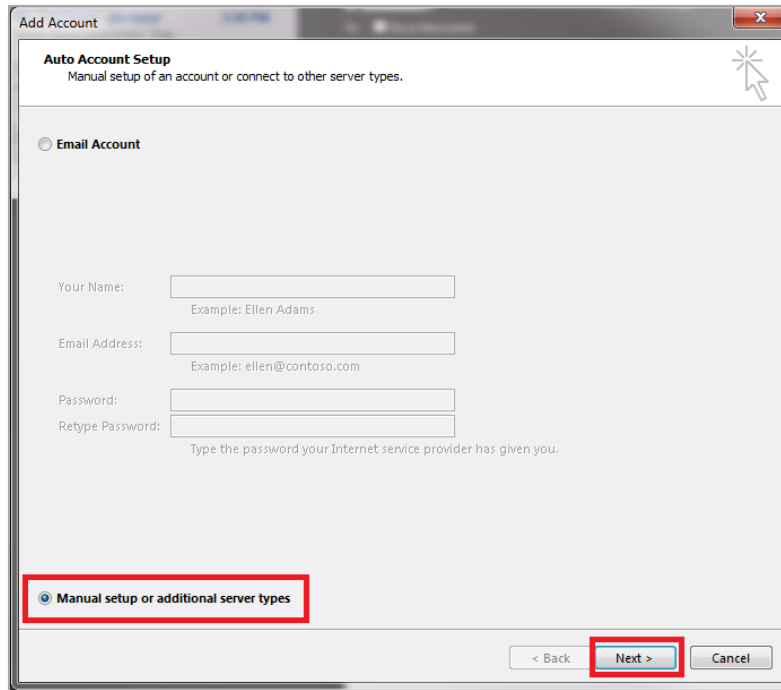
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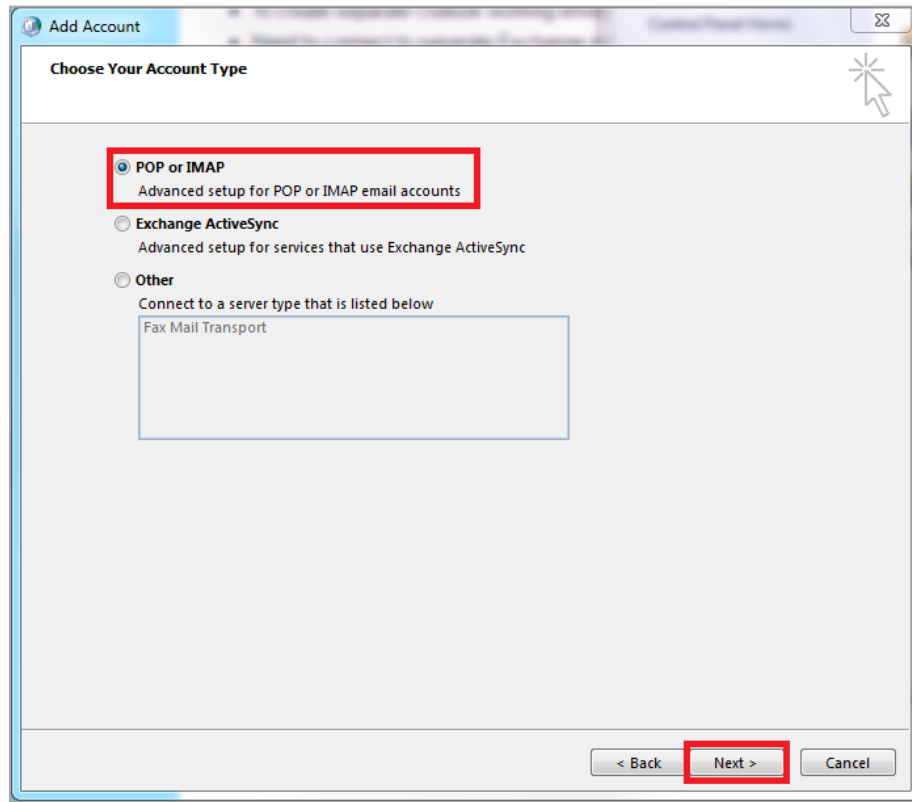
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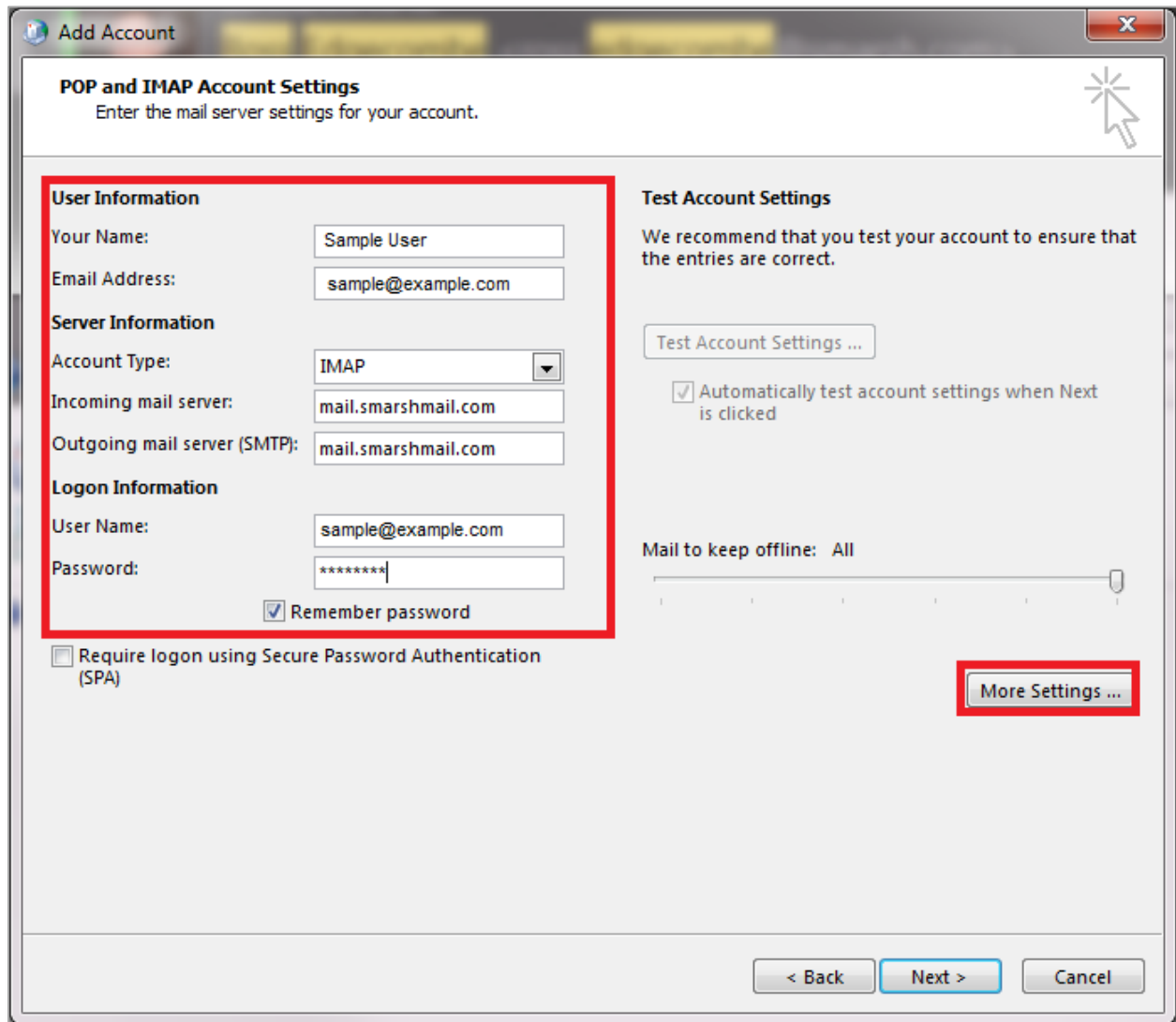


- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your newly upgraded email address in to the **Email Address** field (the email address will not have changed due to the upgrade).
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 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should not have changed with the upgrade).

- Once the above details have been selected and entered, click **More Settings**.



Add Account

POP and IMAP Account Settings
Enter the mail server settings for your account.

User Information

Your Name:

Email Address:

Server Information

Account Type:

Incoming mail server:

Outgoing mail server (SMTP):

Ligon Information

User Name:

Password:

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

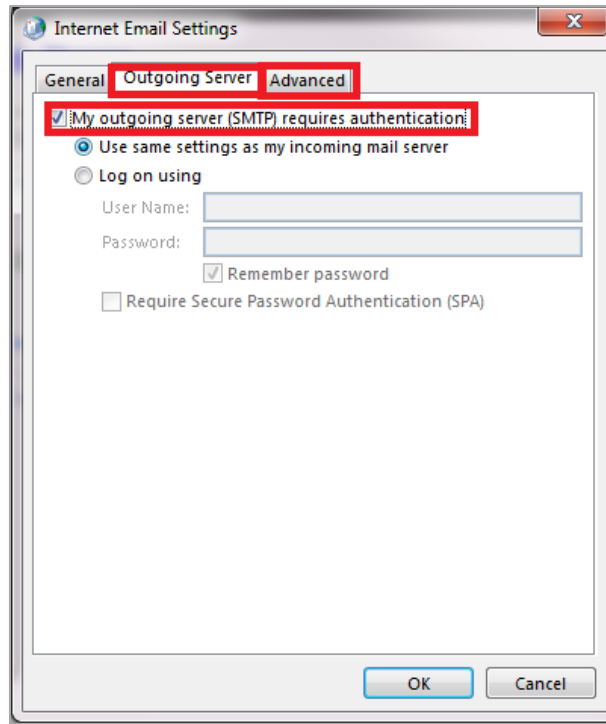
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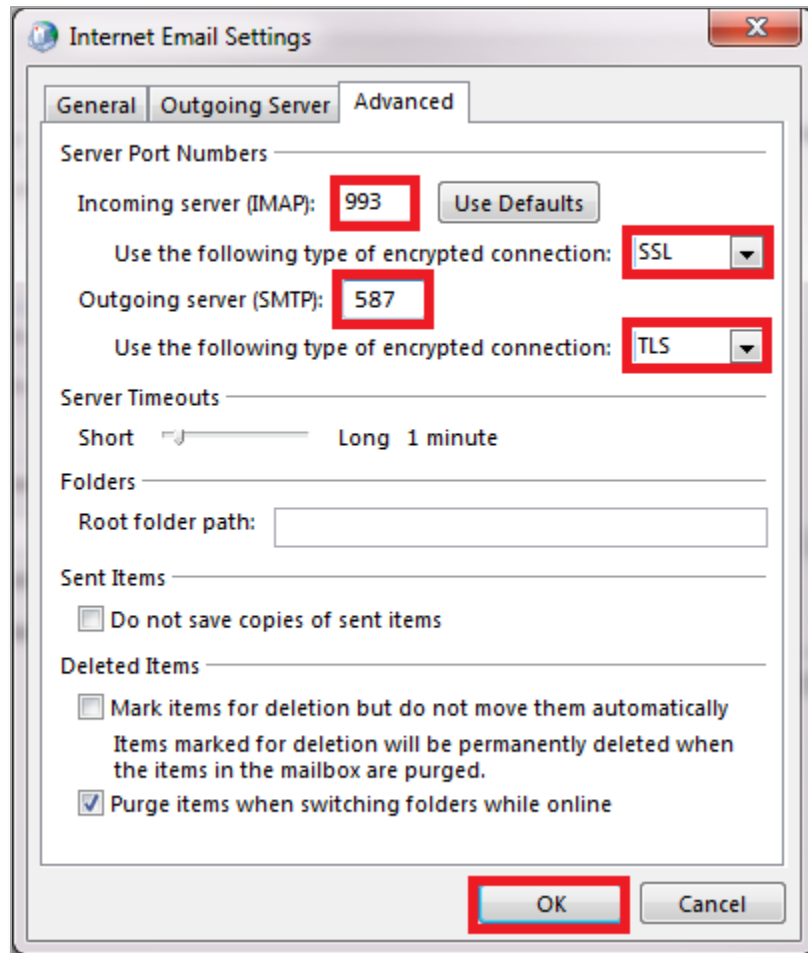
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Mail to keep offline: All

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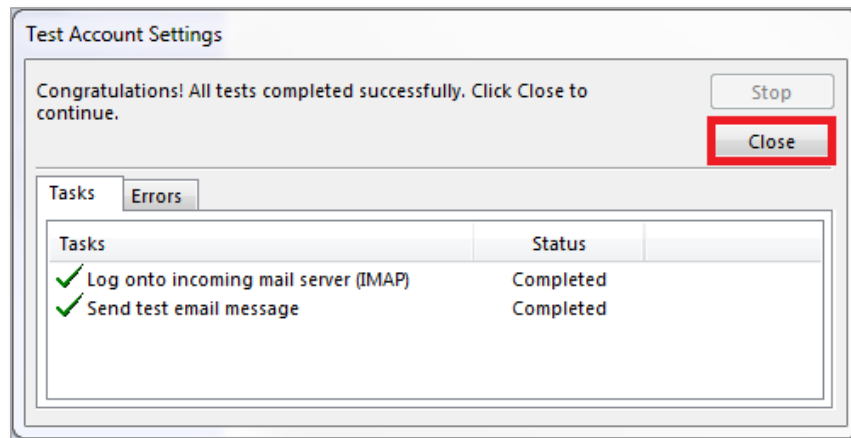


- In the Internet Email Settings window under the **Advanced** tab, complete the following changes:
 - In the **Incoming server (IMAP)** field, enter **993**.
 - In the **Use the following type of encrypted connection** field, select **SSL**.
 - In the **Outgoing server (SMTP)** field, enter **587**.
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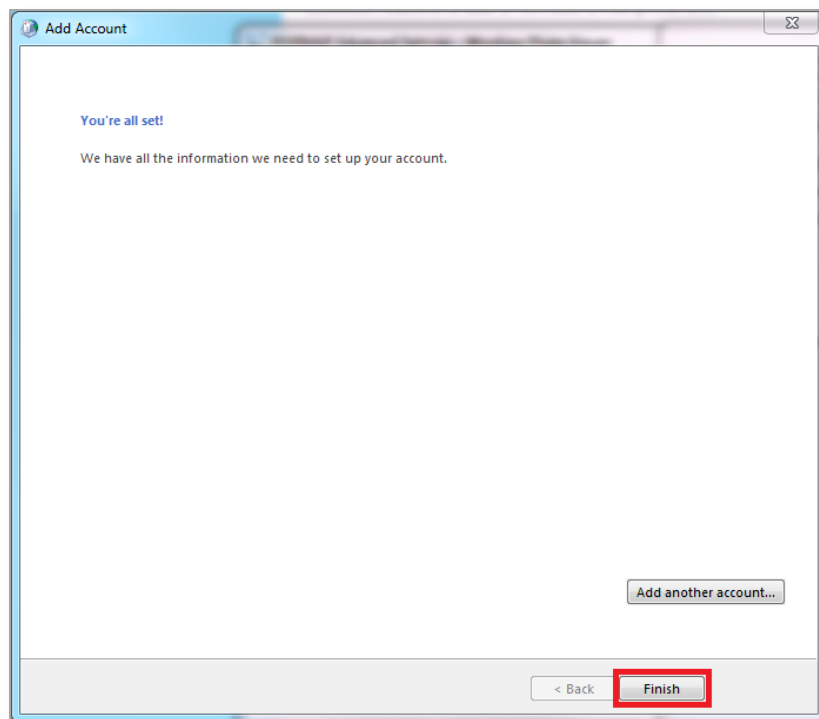


- Once the above details have been selected and entered, click **OK**.

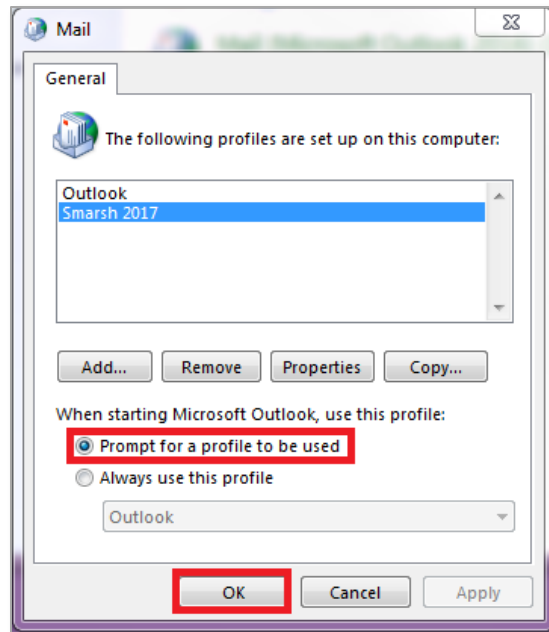
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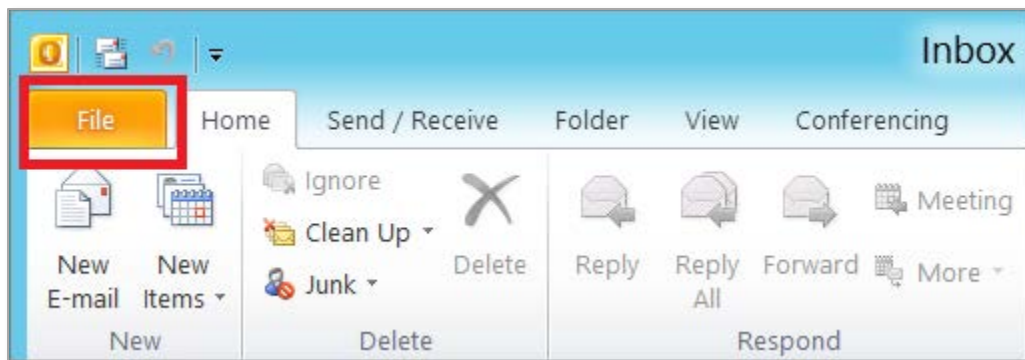
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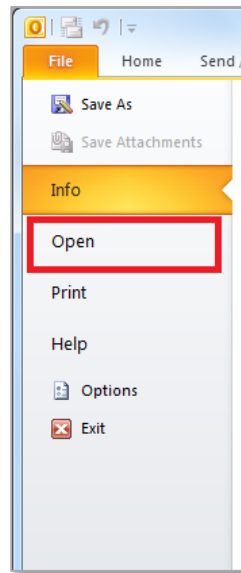
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Connect PST Data to Outlook

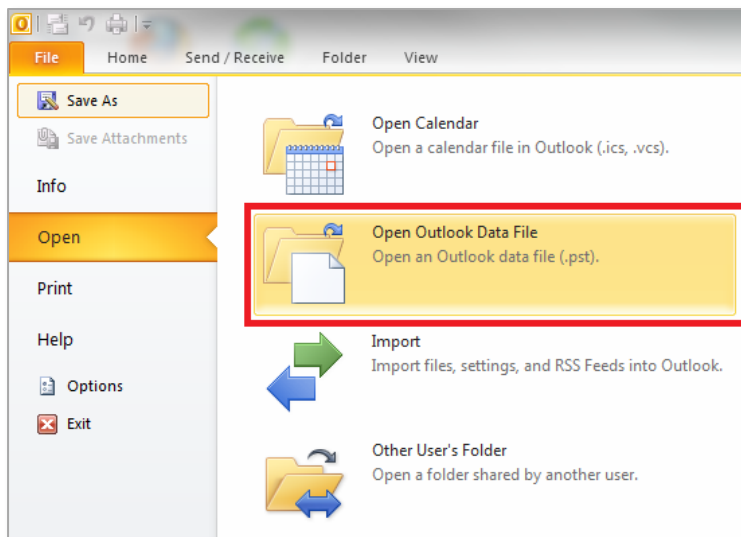
- Start Outlook**; the Choose Profile window will appear. **Select your new profile from the Profile Name dropdown** and click **OK**.
- At the top of your Outlook ribbon, choose the **File** tab.



- Select **Open**.



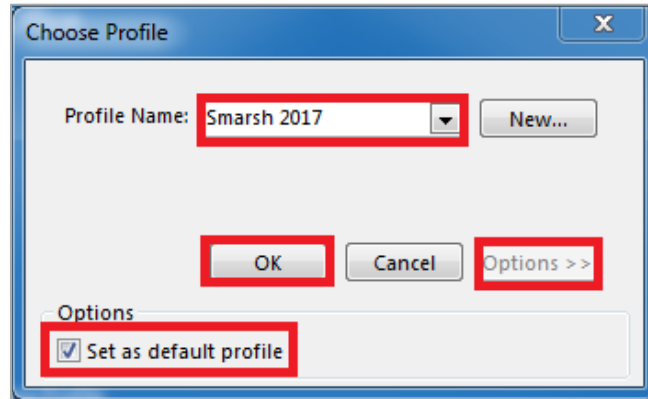
- Select, **Open Outlook Data File**.



- Outlook will look for .pst files on your computer. **Select the .pst for your old profile** and click **Open**.
 - If you are unable to locate the .pst file associated with your old profile, [click here](#) for help on locating Outlook Data Files. Still having trouble? [Click here](#) for an alternate way to open Outlook Data Files.
- Once opened, the **data from your old profile is accessible in Outlook via the left-hand navigation bar**.
- **Quit Outlook** and continue to the next step.

Set Your New Outlook Profile as Default

- **Start Outlook;** the Choose Profile window will appear. Select your **new profile** from the **Profile Name dropdown** and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

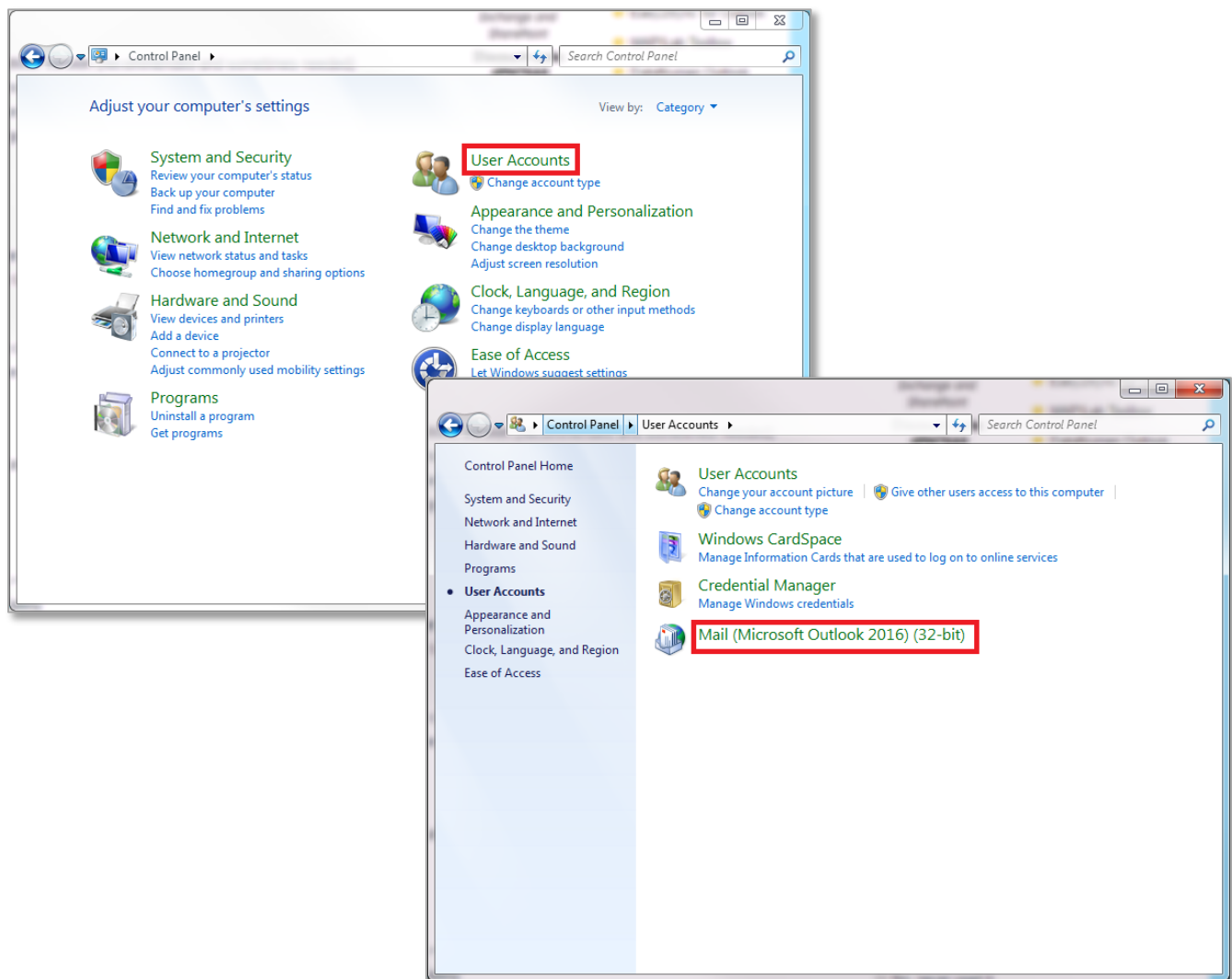
POP to IMAP: Outlook 2007

These instructions will guide you to:

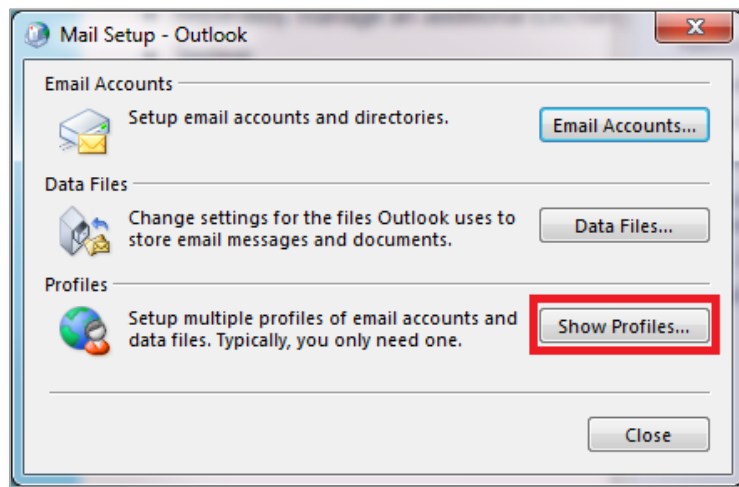
- Create a new Outlook profile
- Export data from your old Outlook profile
- Import data to the new Outlook profile
- Set your new profile as default

Provision a New Outlook Profile

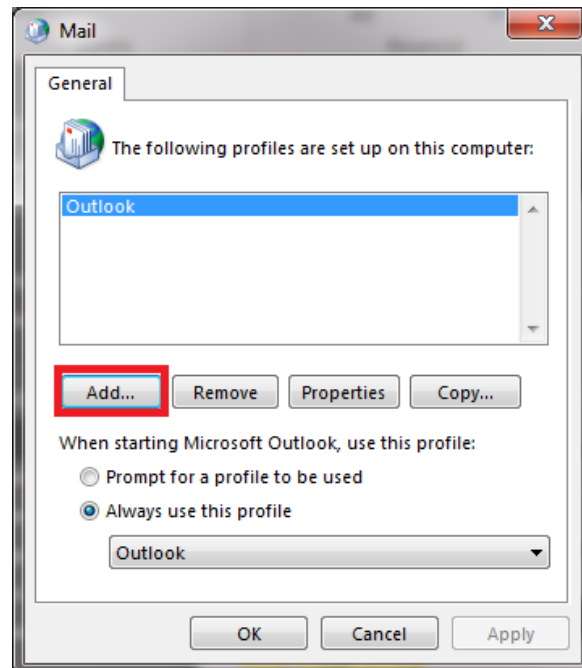
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



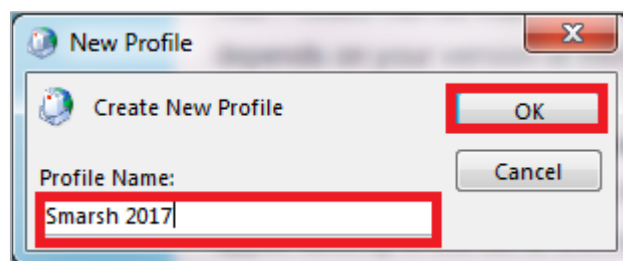
- Once the Mail Setup page appears, select **Show Profiles**.



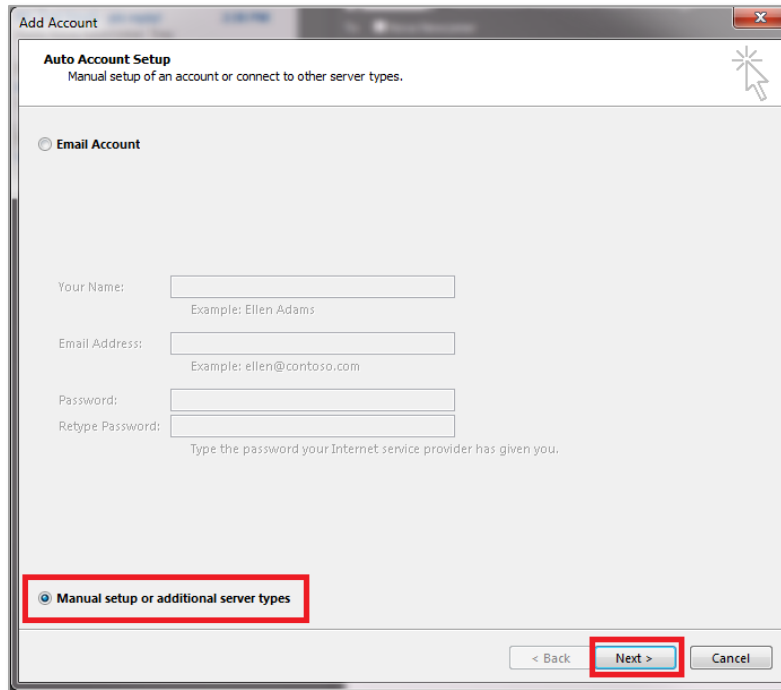
- In the Mail window, click **Add** to create a new Outlook Profile.



- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, the Email Account radio button will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.



Add Account

Auto Account Setup
Manual setup of an account or connect to other server types.

☐ **Email Account**

Your Name:
Example: Ellen Adams

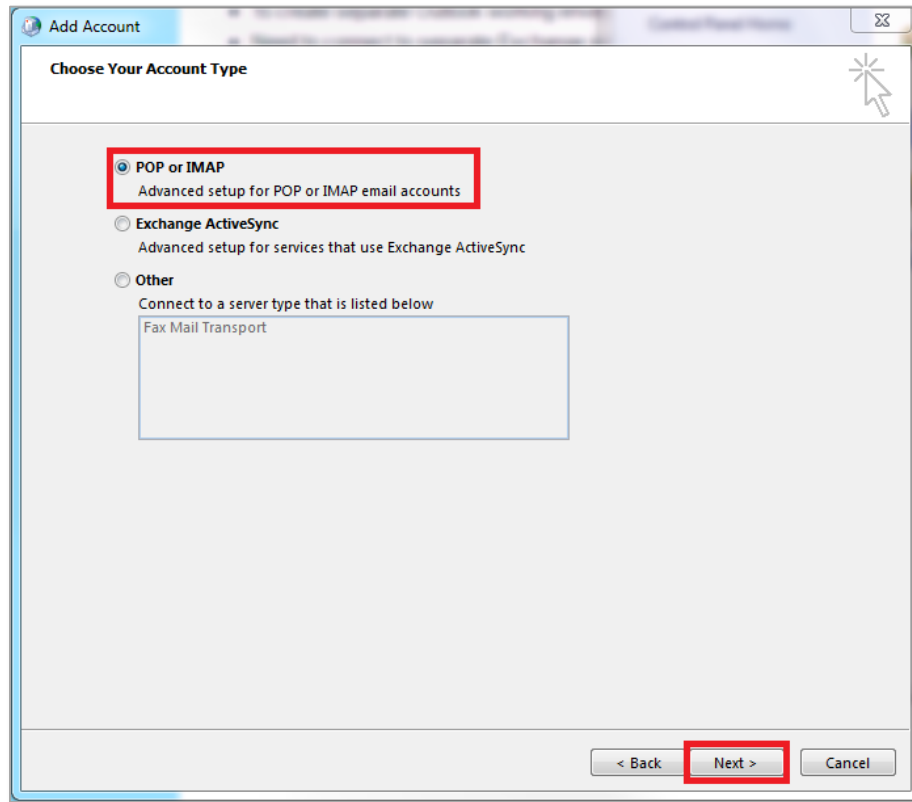
Email Address:
Example: ellen@contoso.com

Password:
Retype Password:
Type the password your Internet service provider has given you.

☒ **Manual setup or additional server types**

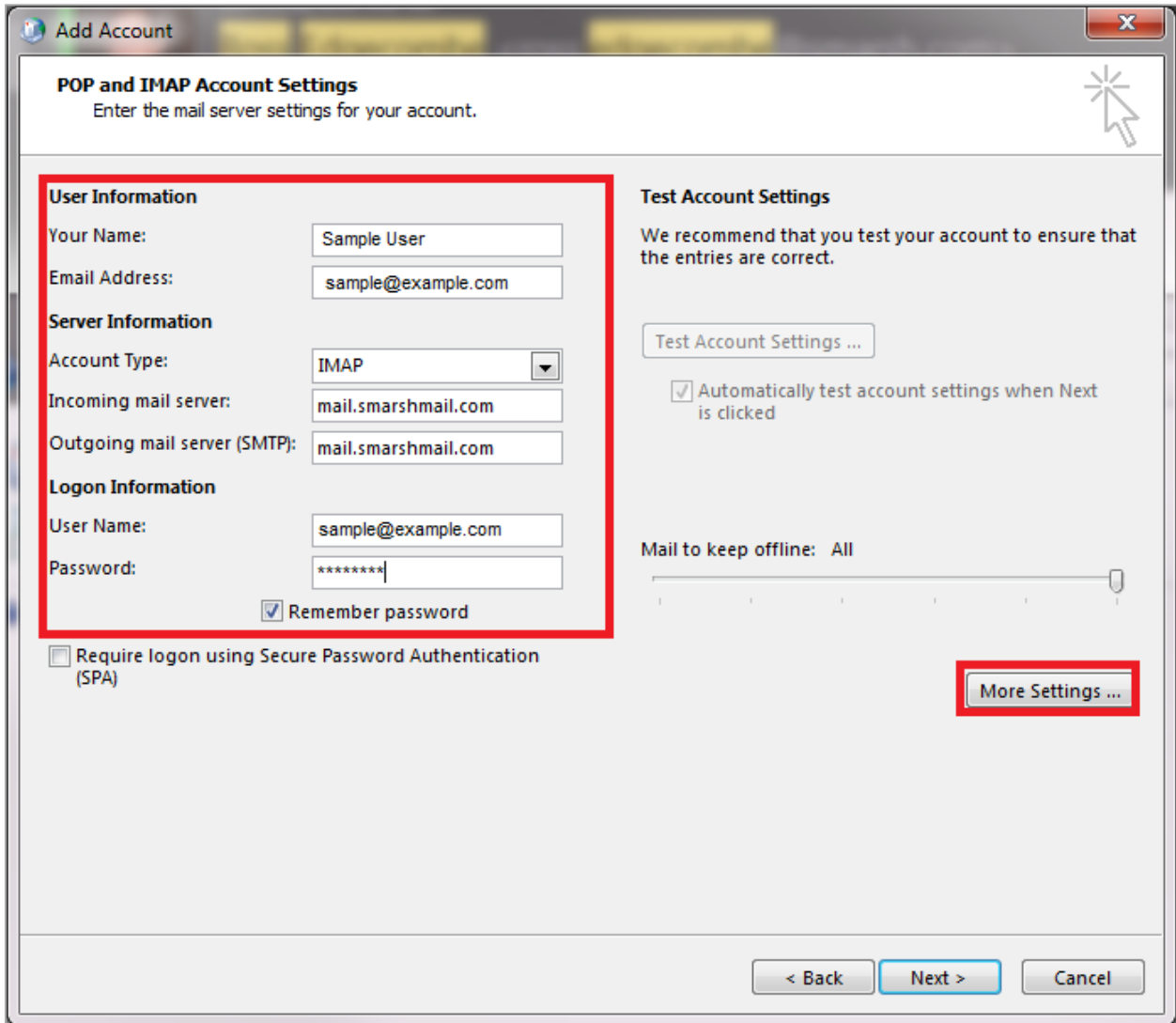
< Back **Next >** Cancel

- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your newly upgraded email address in to the **Email Address** field (the email address will not have changed due to the upgrade).
 - Change the **Account Type** selection from POP3 to **IMAP**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should not have changed with the upgrade).

- Once the above details have been selected and entered, click **More Settings**



Add Account

POP and IMAP Account Settings
Enter the mail server settings for your account.

User Information

Your Name:

Email Address:

Server Information

Account Type:

Incoming mail server:

Outgoing mail server (SMTP):

Logon Information

User Name:

Password:

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings

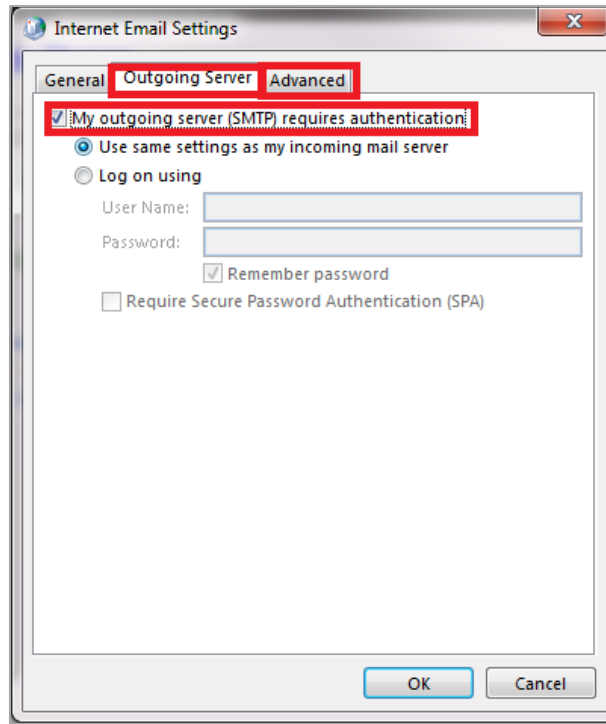
We recommend that you test your account to ensure that the entries are correct.

☒ Automatically test account settings when Next is clicked

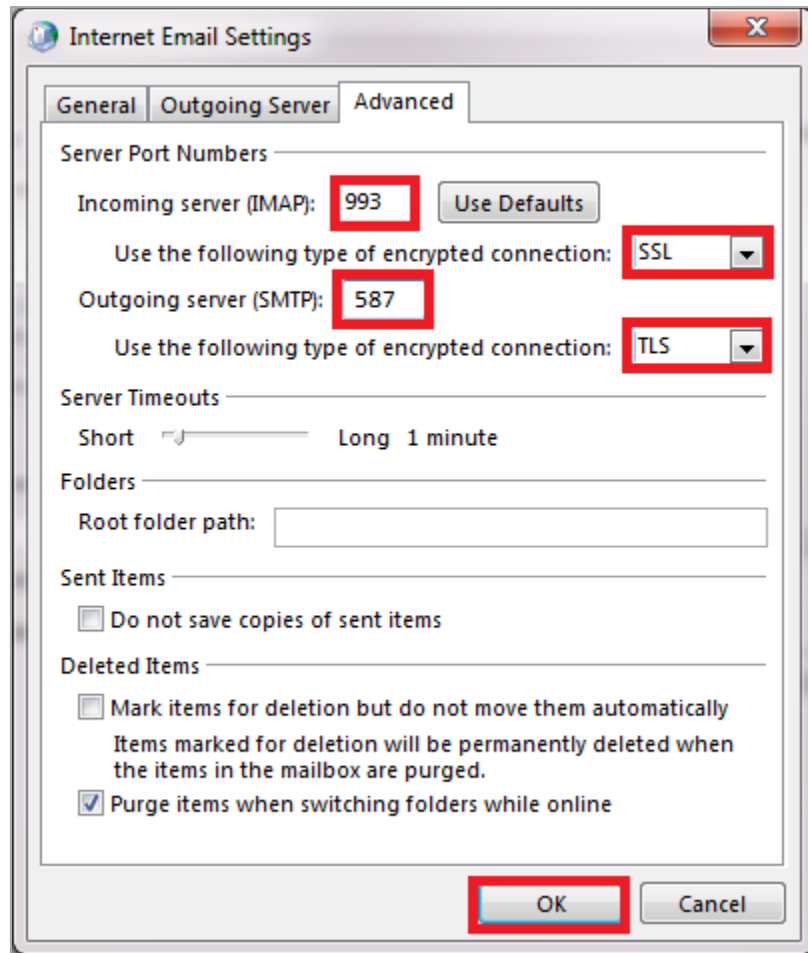
Mail to keep offline: All

< Back Next > Cancel

- In the Internet Email Settings window, select the **Outgoing Server** Tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be selected by default. Click the **Advanced** tab.

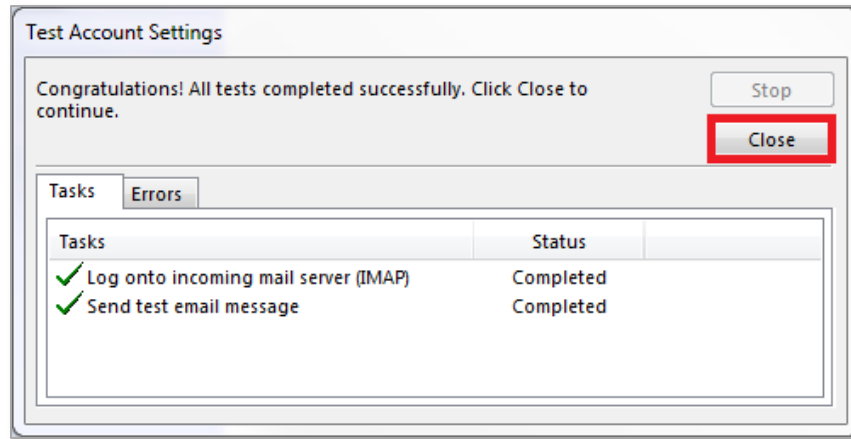


- In the Internet Email Settings window under the **Advanced** tab, complete the following changes:
 - In the **Incoming server (IMAP)** field, enter **993**.
 - In the **Use the following type of encrypted connection** field, select **SSL**.
 - In the **Outgoing server (SMTP)** field, enter **587**.
 - In the **Use the following type of encrypted connection** field, select **TLS**.

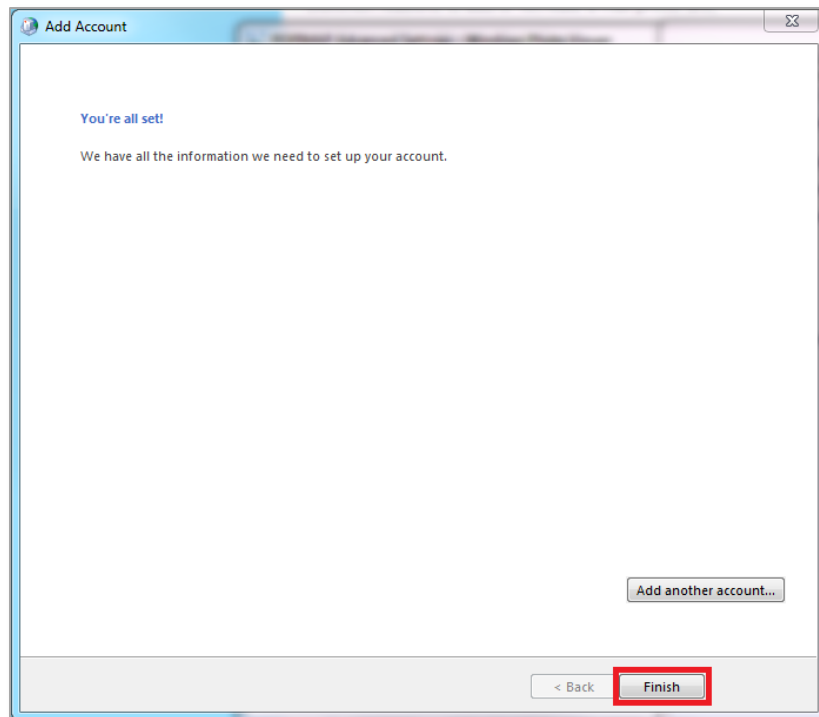


- Once the above details have been selected and entered, click **OK**.

- On the Add Account window, click **Next**. Windows will now attempt to log on to the incoming mail server (IMAP) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.

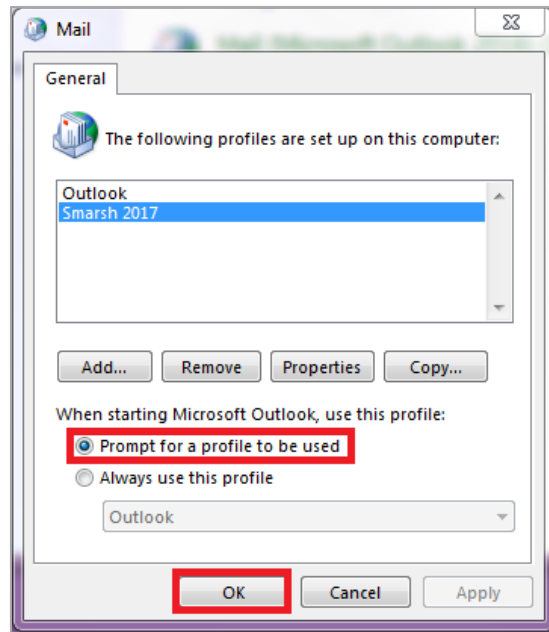


- If the tasks do not complete successfully, consider returning to the previous screen and confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



•

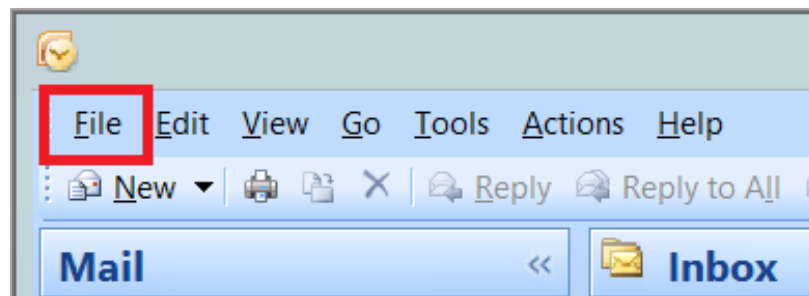
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure the **Prompt for a profile to be used** radio button is selected and click **OK**.



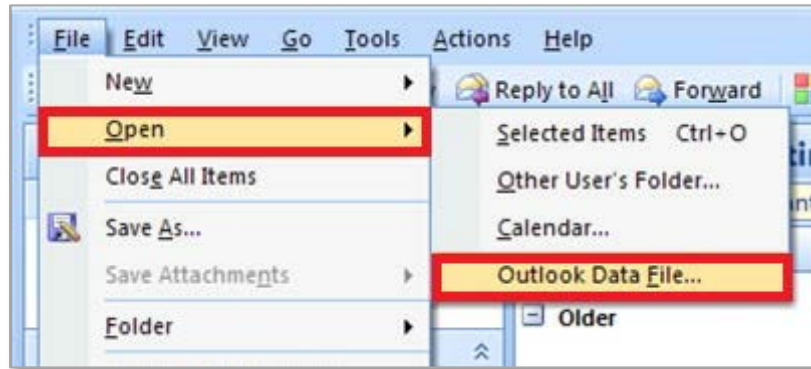
- Once all email data has been verified to be intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** is selected from the dropdown.

Connect PST Data to Outlook

- Start Outlook.** The Choose Profile window will appear. **Select your new profile** from the Profile Name dropdown and click **OK**.
- Click **File**.



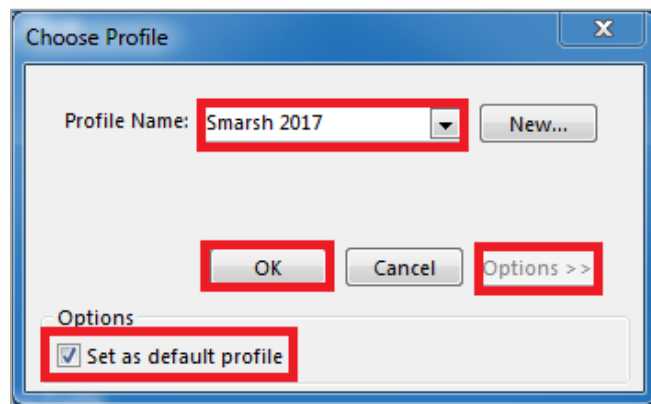
- Choose **Open > Outlook Data File**.



- Outlook will look for .pst files on your computer. **Select the .pst for your old profile** and click **Open**.
 - If you are unable to locate the .pst file associated with your old profile, [click here](#) for help on locating Outlook Data Files. Still having trouble? [Click here](#) to learn more about opening Outlook Data Files.
- Once opened, the **data from your old profile is accessible in Outlook via the left-hand navigation bar**.
- **Quit Outlook** and continue to the next step.

Set Your New Outlook Profile as Default

- **Start Outlook**; the Choose Profile window will appear. Select your **new profile from the Profile Name dropdown** and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

Apple Mac OS X 10.6+

POP to IMAP: Outlook for Mac 2016

These instructions will guide you to:

- **Export your existing mail** from Outlook.
- **Import your existing mail** back into Outlook so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Outlook).
- **Remove your old mail account** from Outlook.
- **Add your new email account** to Outlook.

Export Existing Mail from Outlook

- Launch **Outlook**.
- Click **File** and select **Export**.
- Select **All Item Types**.
- Click **Continue**.
- **Save the File** in an easy to find location. Click **Continue**.
- Once the Export completes click **Finish**.

Import Existing Mail Back into Outlook

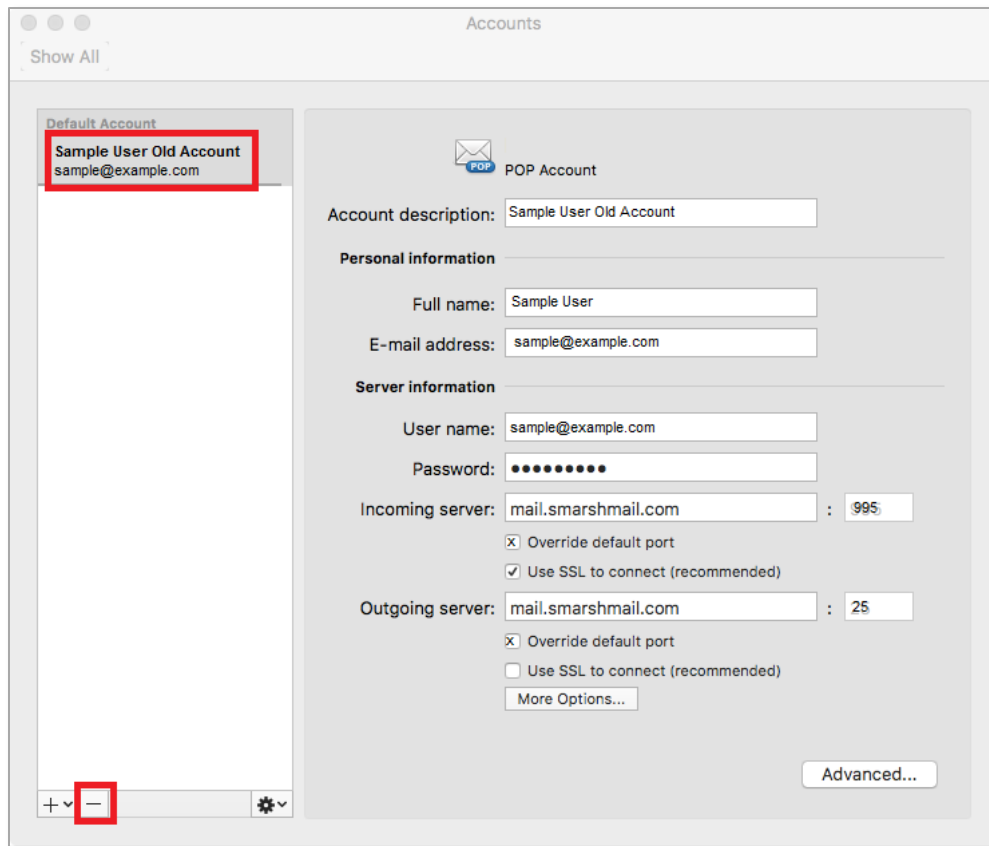
- In Outlook, click **File**, then select **Import**.
- Select **Outlook for Mac Archive file (.olm)** and click **Continue**.
- Browse to where you saved your Outlook For Mac Archive File (.olm) in the previous step. Click **Import**.
 - For more information on this process, [Click Here](#) to view a Microsoft Support Article.
- The import will start immediately. Click **Finish** once complete.

Remove your Old Mail Account

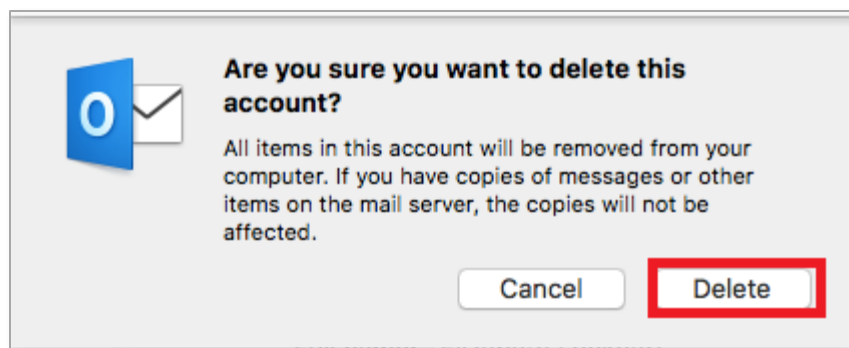
CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server any more.

- In Outlook, click **Tools > Accounts**.

- Select the **Account** and click the **minus symbol (-)** in the bottom left hand corner of the Accounts screen.

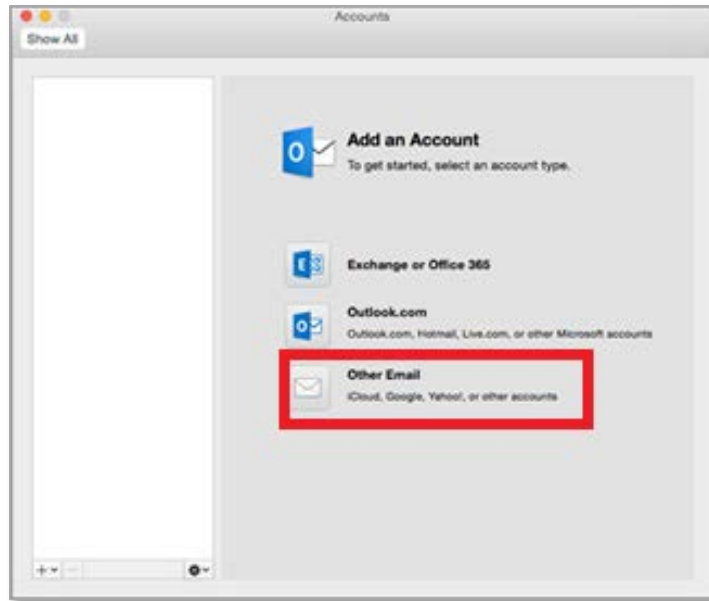


- Outlook will warn you of a data loss; **ONLY if you have verified you have imported your mail per the previous instructions** should you click **Delete** and continue forward.



Add your New Email Account

- In the **Accounts** box, click **Other Email**.



- Enter your **email address** and **password**.
- Enter the **mail server options as identified below** and click **Add Account**.

Enter your account information.

E-mail address:

Password:

☐ Configure automatically

User name:

Type:

Incoming server: :

☒ Override default port

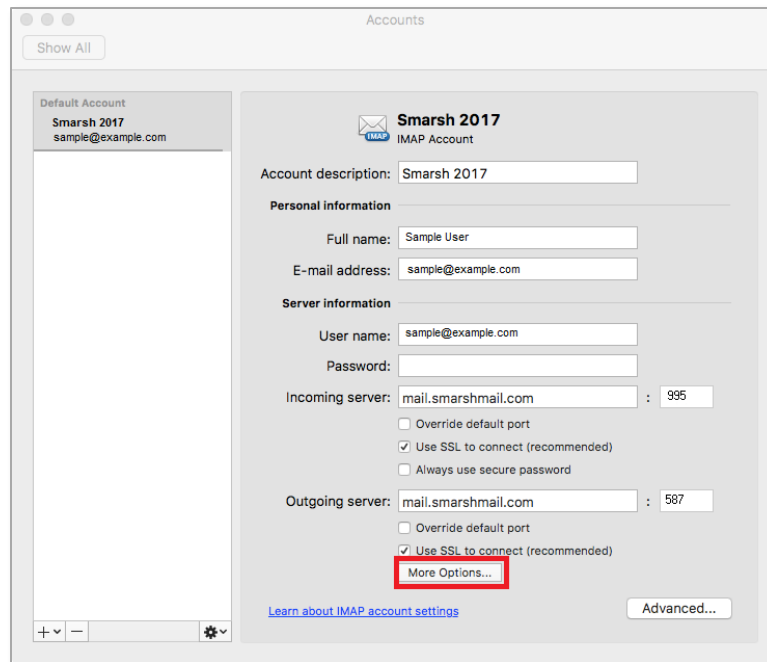
☒ Use SSL to connect (recommended)

Outgoing server: :

☒ Override default port

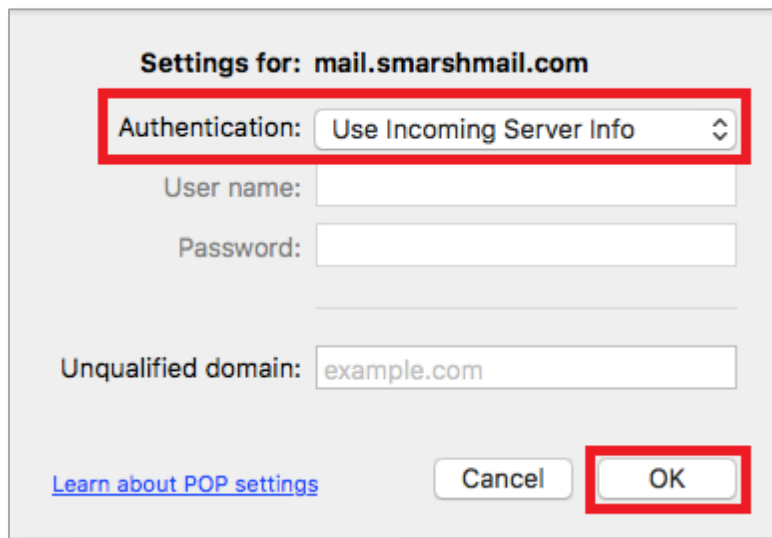
☒ Use SSL to connect (recommended)

- On the main Accounts window, select your new account as added to Outlook. You can change the account description if you like (ex. Smarsh 2017).
- Click **More Options**.



The screenshot shows the 'Accounts' window in Outlook. On the left, a list of accounts includes 'Smarsh 2017' with email 'sample@example.com'. The main pane shows the configuration for this account. Under 'Server information', the 'Incoming server' is 'mail.smarshmail.com' on port 995. The 'Outgoing server' is 'mail.smarshmail.com' on port 587. Both servers have 'Use SSL to connect (recommended)' checked. The 'More Options...' button at the bottom is highlighted with a red box.

- Confirm **Use Incoming Server Info** for mail.smarshmail.com authentication is selected. Click **OK**.



The screenshot shows the 'Settings for: mail.smarshmail.com' dialog box. The 'Authentication' dropdown menu is open, showing 'Use Incoming Server Info' selected. Below it are fields for 'User name', 'Password', and 'Unqualified domain' (containing 'example.com'). At the bottom, the 'OK' button is highlighted with a red box.

- Your mail account will now be taken online and your mail will begin to download from the server. You may now **close the Accounts window** and send/receive mail.
- The first time you send a message, **Outlook may prompt for your email password. Enter your email password** and check the box to have your computer **remember your password** going forward.

Continue to Step 4: [Configure your Mobile Device\(s\)](#)

POP to IMAP: Outlook for Mac 2011

These instructions will guide you to:

- **Export your existing mail** from Outlook.
- **Import your existing mail** back into Outlook so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Outlook).
- **Remove your old mail account** from Outlook.
- **Add your new email account** to Outlook.

Export Existing Mail from Outlook

- Launch **Outlook**.
- Click **File** and select **Export**.
- Select **Outlook for Mac Data File (.olm)** and **Items of the Following Types: Check All Types Desired**.
- Click **the right arrow** to Continue.
- Select **No, do not delete items**.
- Click **the right arrow** to Continue.
- **Name and Save the File** in an easy to find location. **Save**.
- Once the Export completes click **Done**.

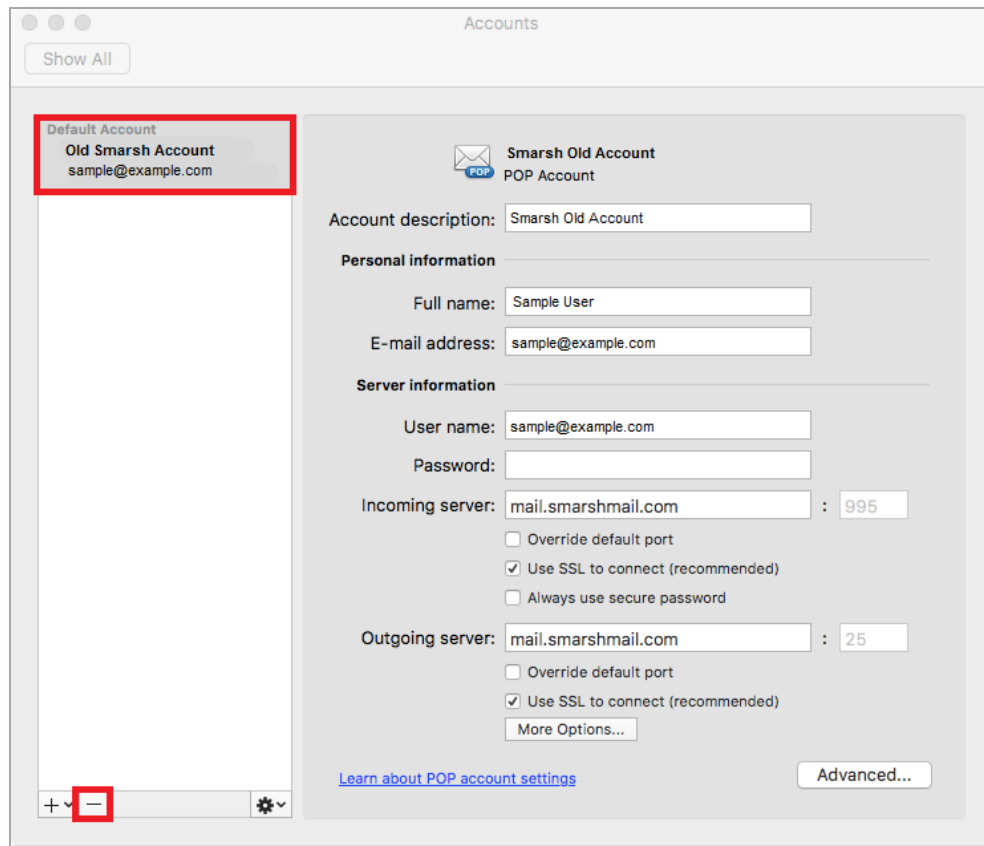
Import Existing Mail Back into Outlook

- In Outlook, click **File**, then select **Import**.
- Select **Outlook Data File (.pst or .olm)** and click **the right arrow** to continue.
- Select **Outlook for Mac Data File (.olm)** and click **the right arrow** to continue.
- **Browse** to where you saved **your Outlook For Mac Archive File (.olm)** in the previous step. Click **Import**.
 - For more information on this process, [Click Here](#) to view a Microsoft Support Article.
- The import will start immediately. Click **Done** once complete.

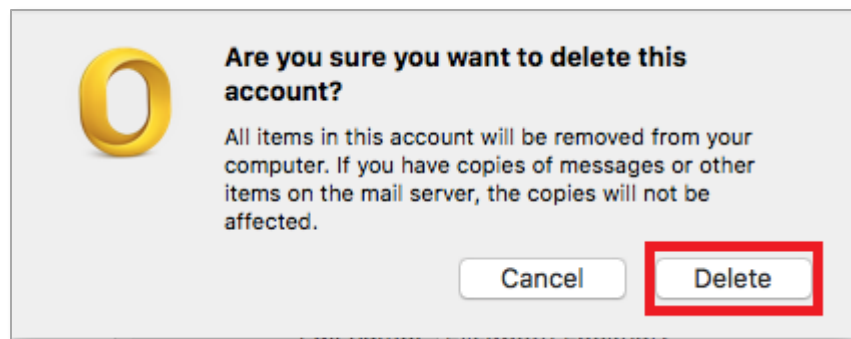
Remove your Old Mail Account

CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

- In Outlook, click **Tools > Accounts**.
- Select the **Account** and click the **minus symbol (-)** in the bottom left hand corner of the Accounts window.

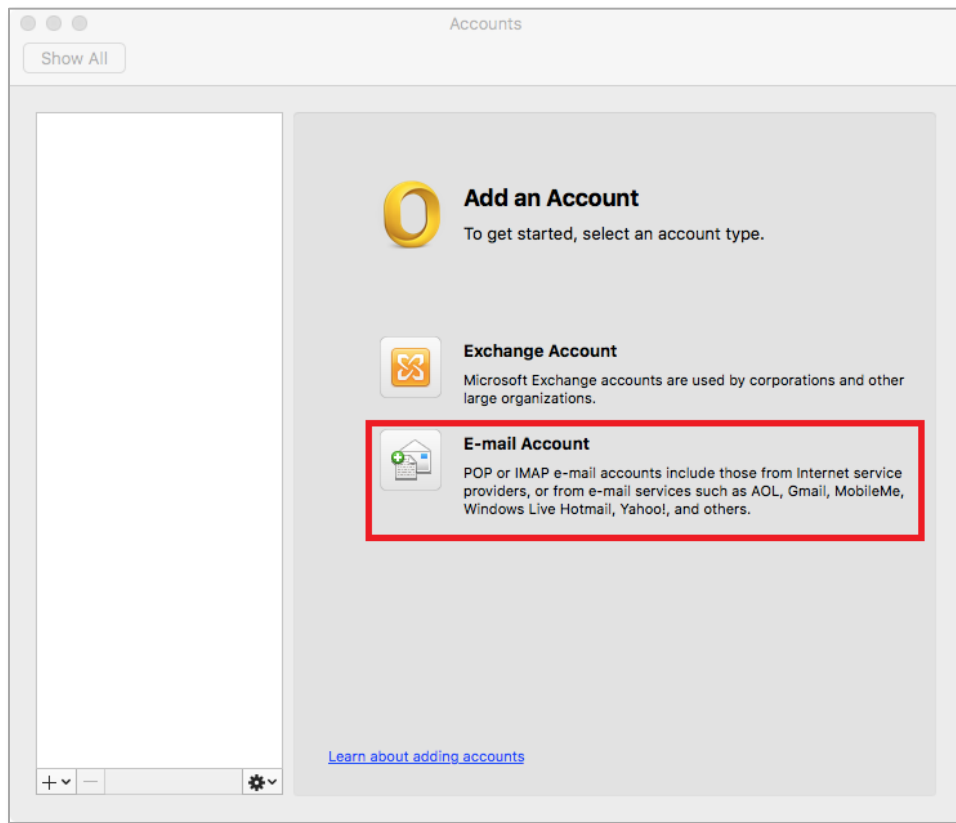


- Outlook will warn you of a data loss; **ONLY if you have verified you have imported your mail per the previous instructions** should you click **Delete** and continue forward.

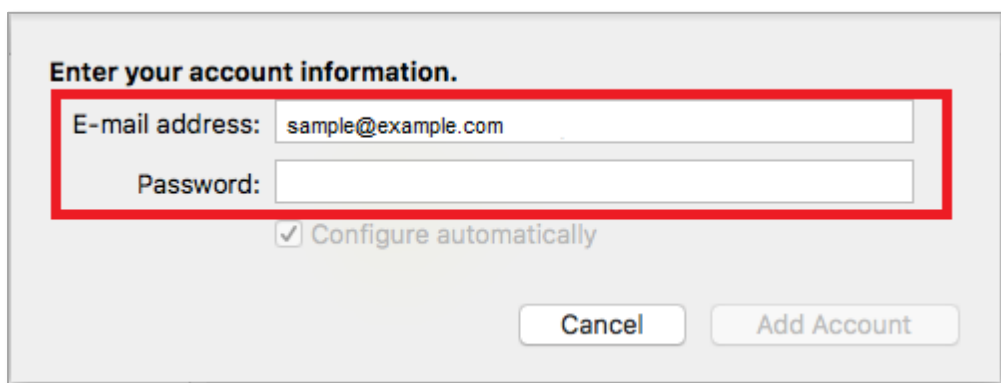


Add your new Email Account

- In the **Accounts** window, click **Email Account**.

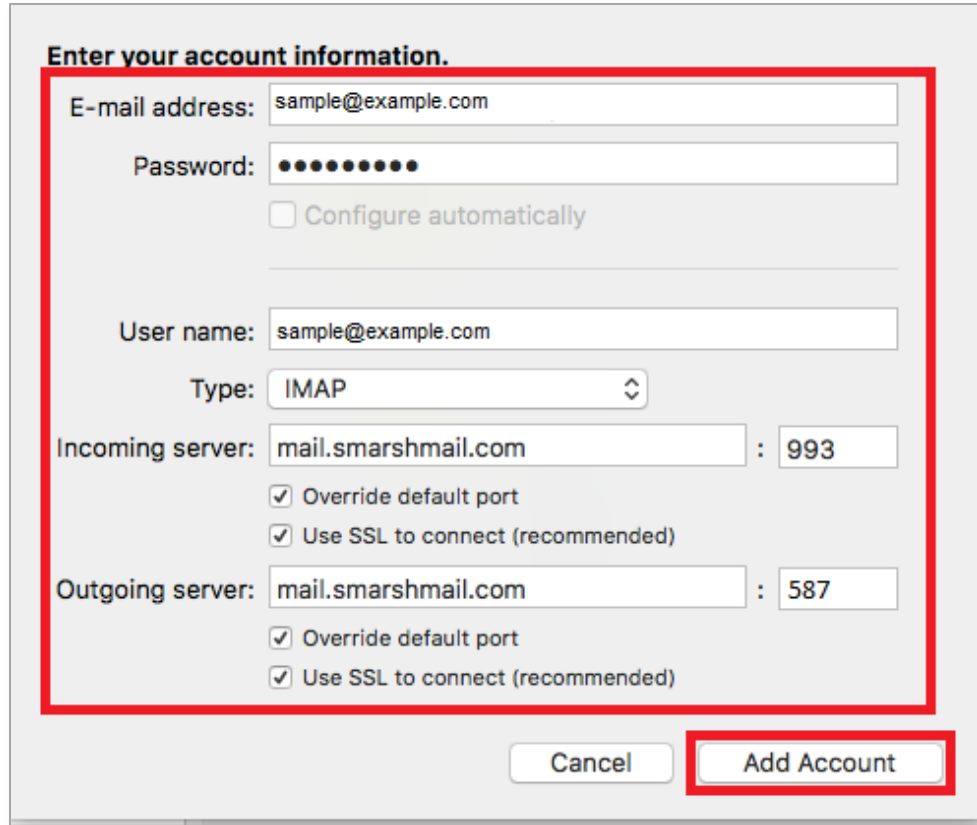


- Enter your **email address and password** tab into the **password field**, the window will expand to allow for full server settings to be inserted.



The screenshot shows a dialog box titled 'Enter your account information.' It contains two input fields: 'E-mail address:' with the value 'sample@example.com' and 'Password:'. A red box highlights these two fields. Below the fields is a checkbox labeled 'Configure automatically' which is checked. At the bottom are two buttons: 'Cancel' and 'Add Account'.

- Enter the following server details and click **Add Account**:



Enter your account information.

E-mail address: sample@example.com

Password: ••••••••

☐ Configure automatically

User name: sample@example.com

Type: IMAP

Incoming server: mail.smarshmail.com : 993

☒ Override default port

☒ Use SSL to connect (recommended)

Outgoing server: mail.smarshmail.com : 587

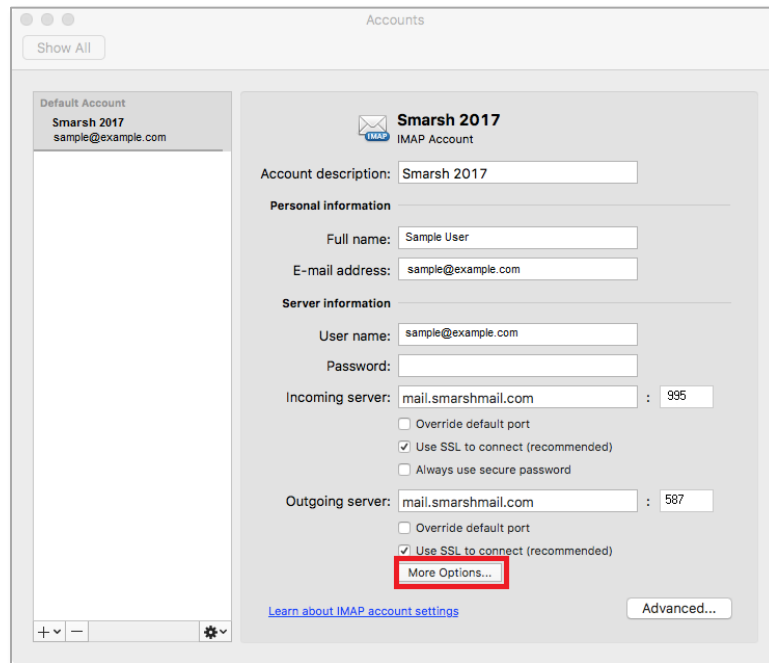
☒ Override default port

☒ Use SSL to connect (recommended)

Cancel Add Account

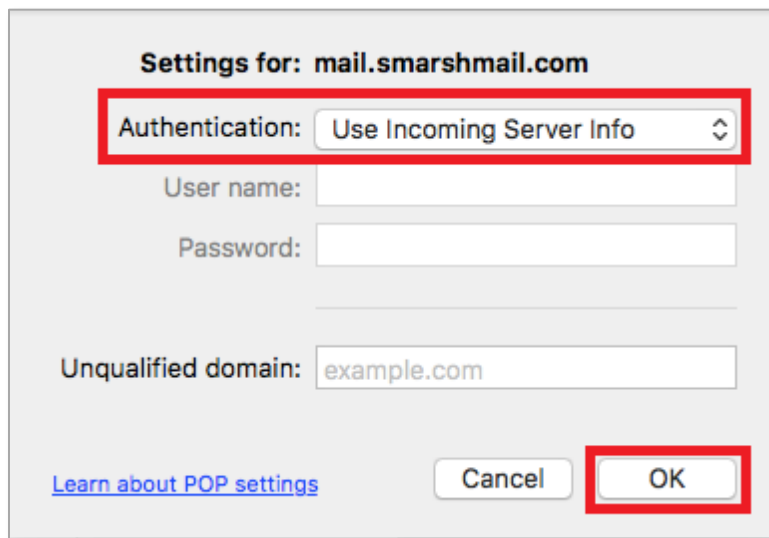
- In the main Accounts window, highlight your new account as added to Outlook. You can change the account description if you like (ex. Smarsh 2017).

- Click **More Options**.



The screenshot shows the 'Accounts' window in Outlook. On the left, a list of accounts includes 'Smarsh 2017' with email 'sample@example.com'. The main pane shows the configuration for 'Smarsh 2017' IMAP Account. Fields include: Account description (Smarsh 2017), Personal information (Full name: Sample User, E-mail address: sample@example.com), and Server information (User name: sample@example.com, Password: [redacted], Incoming server: mail.smarshmail.com:995, Outgoing server: mail.smarshmail.com:587). The 'Use SSL to connect (recommended)' checkbox is checked for both servers. The 'More Options...' button at the bottom is highlighted with a red box.

- Select **Use Incoming Server Info** for mail.smarshmail.com authentication. Click **OK**.



The screenshot shows the 'Settings for: mail.smarshmail.com' dialog box. The 'Authentication' dropdown menu is set to 'Use Incoming Server Info' and is highlighted with a red box. Below it are fields for 'User name:', 'Password:', and 'Unqualified domain: example.com'. At the bottom, there is a 'Learn about POP settings' link, a 'Cancel' button, and an 'OK' button which is also highlighted with a red box.

Your mail account will now be taken online and your mail will begin to download from the server. You may now **close the accounts window** and send/receive mail.

- The first time you send a message, Outlook may prompt for your email password. Enter your email password and check the box to have your computer remember your password going forward.

Continue to **Step 4: [Configure your Mobile Device\(s\)](#)**

POP to IMAP: Apple Mail

These instructions will guide you to:

- **Export your existing mail** from Apple Mail.
- **Import your existing mail** back into Apple Mail so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Apple Mail).
- **Remove your old mail account** from Apple Mail.
- **Add your new email account** to Apple Mail.

Export Existing Mail from Apple Mail

- Launch **Mail**.
- **Select your old Smarsh Hosted Services Mailbox**, then choose **Mailbox > Export Mailbox**.
- **Choose a folder or create a new folder**, then click **Choose**.
- Your mail file export will begin immediately. Wait for the file to appear as “INBOX.mbox” wherever you saved your export.
- **Exit Mail**.

Import Old Mail Back into Apple Mail

Any mail that was not stored on the server will need to be imported from the export file you created in the last section. To import your mail items:

- Launch **Mail**.
- Click **File > Import Mailboxes**.
- Select **Apple Mail** and click **Continue**.
- **Locate your Exported Mailbox File** and click **Choose**.
- Your mail will import directly to Apple Mail. Click **Done**.

Imported mail will show up under the “Import” folder in the “On My Mac” section of Apple Mail. Utilize your new email account inbox for sending and receiving new messages.

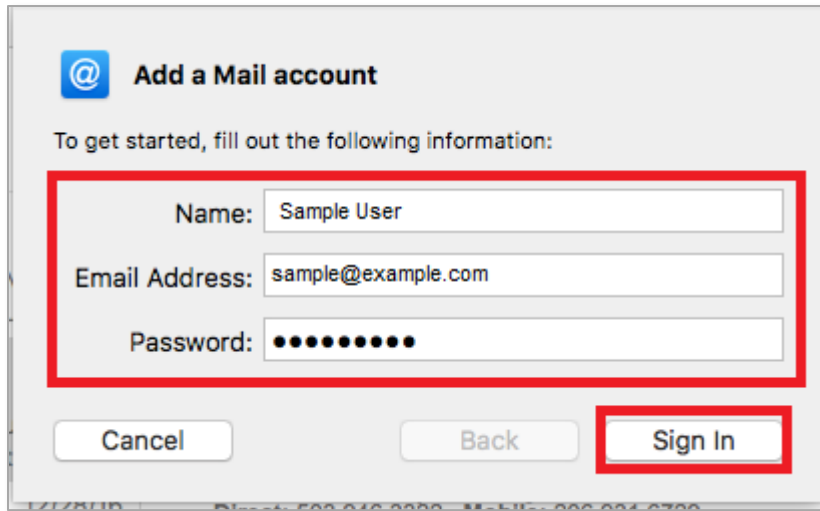
Remove Old Mail Account

CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

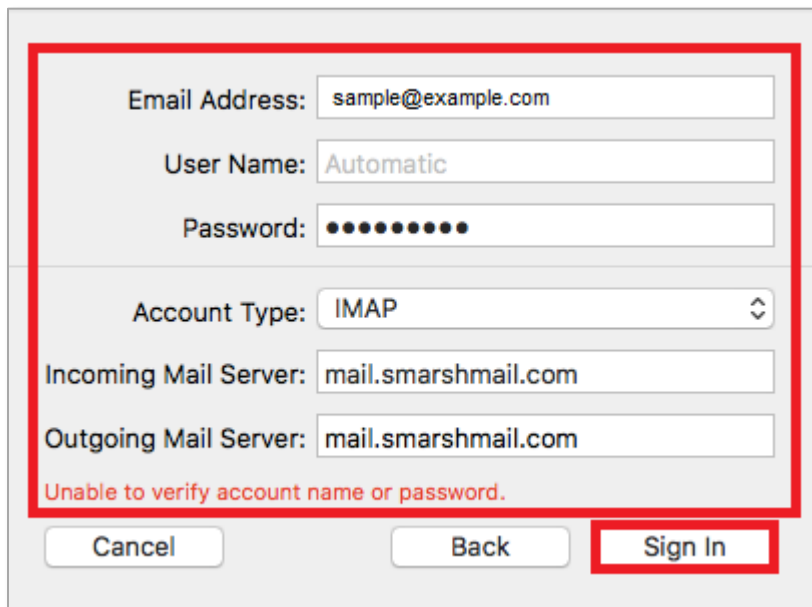
- Launch **Mail**.
- Click **Mail > Accounts**.
- Select your **Old Smarsh Email Account** and **click the minus (–) or remove** button.
- Select **OK**.
- **Close the Internet Accounts** window.

Add New Mail Account

- With Mail open, click **Mail > Add Account**.
- From the list of account types select **Add Other Mail Account** and click **Continue**.
- Enter your **Full Name**, **Email Address** and **Password**. When finished, click the **Create** or **Sign In** button.



- You will receive a message that the account is unable to verify your name or password. **Enter the following server details** and click **sign in**:



- Your mail account will now be taken online and your mail will begin to download from the server. Your old mail will be available on your computer in the file as exported and imported into the Mail application.

Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

Post-Upgrade: IMAP to IMAP

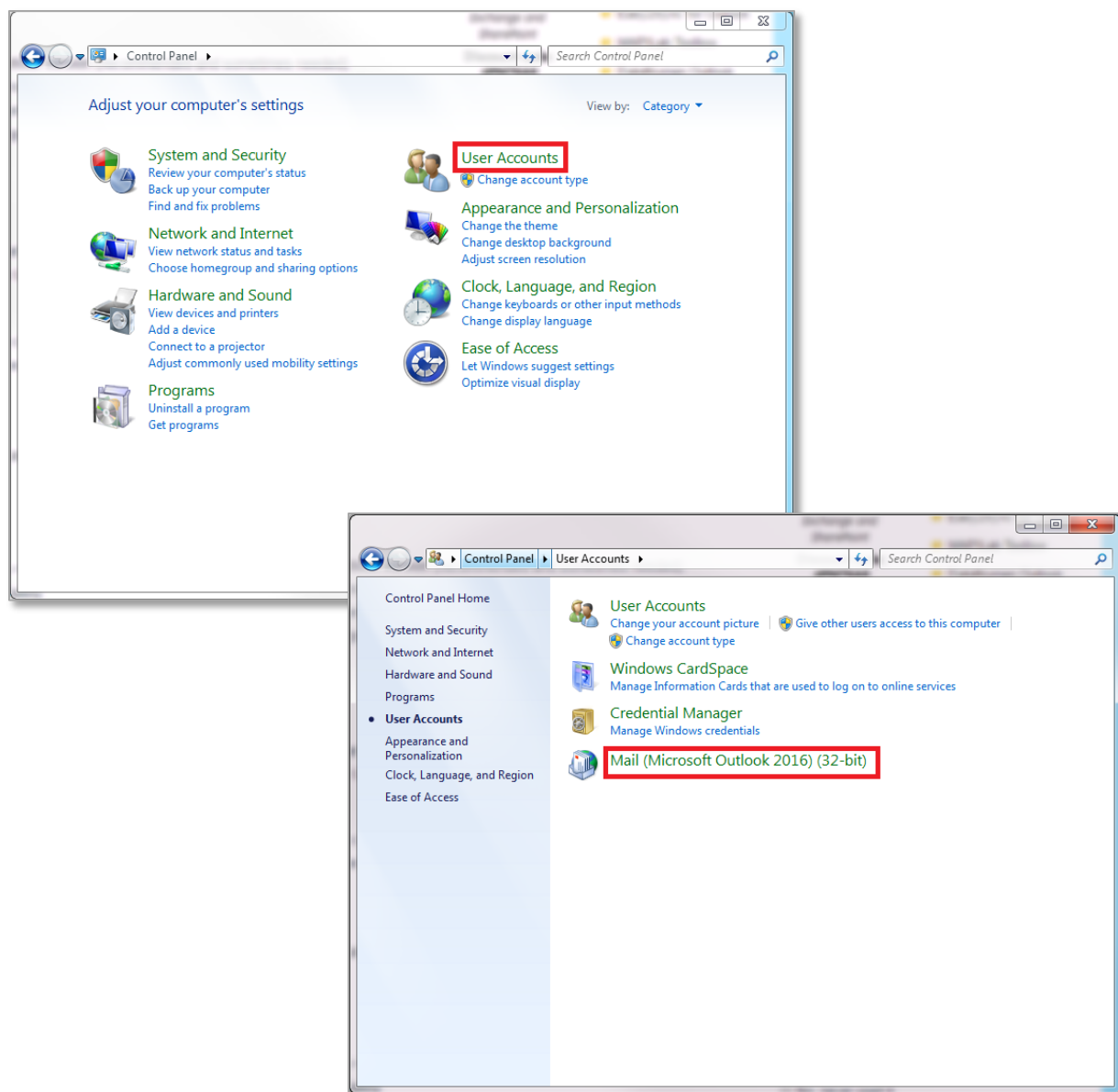
IMAP to IMAP: Microsoft Windows 7/8/10 – Outlook 2007/2010/2013/2016

These steps will guide you to:

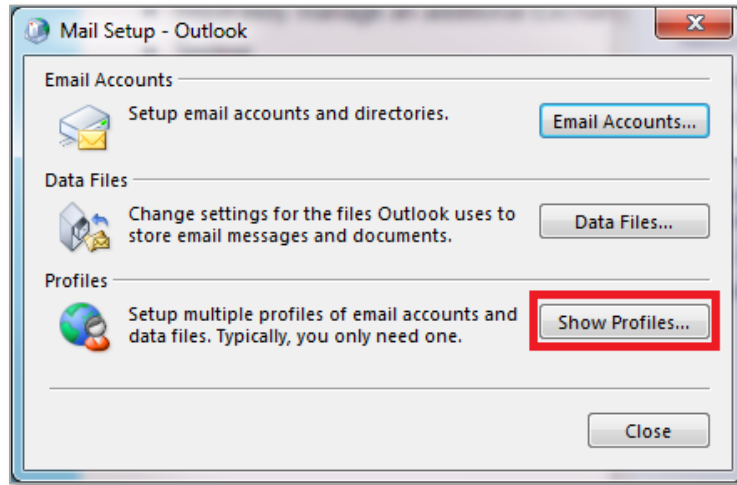
- Provision a new Outlook profile.
- Set your new Outlook profile as default.

Provision a New Outlook Profile

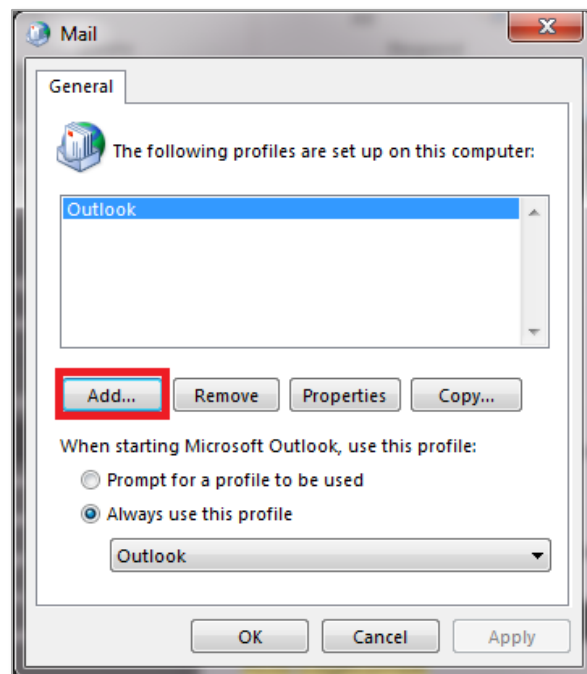
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



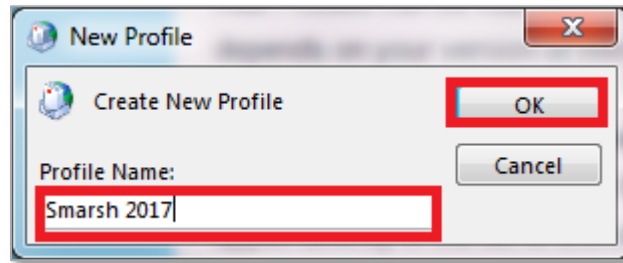
- Once the Mail Setup page appears, select **Show Profiles**.



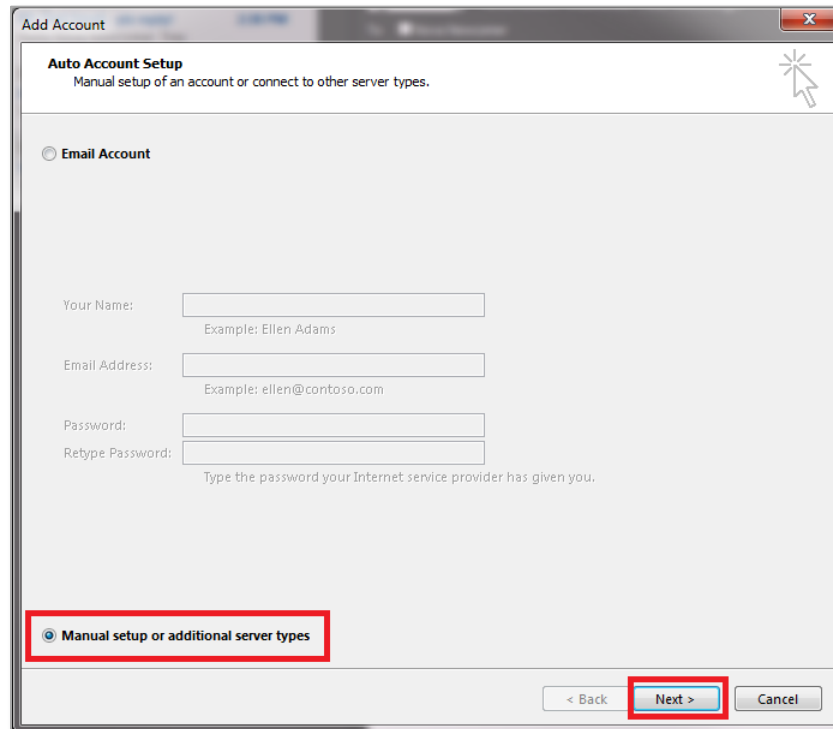
- In the Mail window, click **Add** to create a new Outlook Profile.



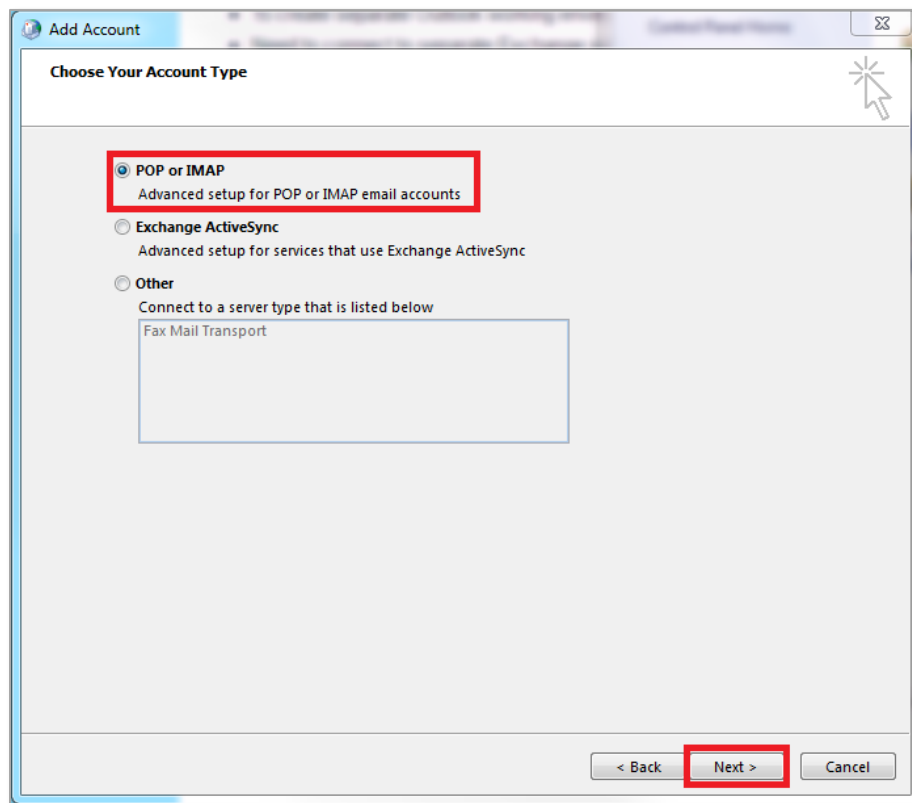
- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, Email Account will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.

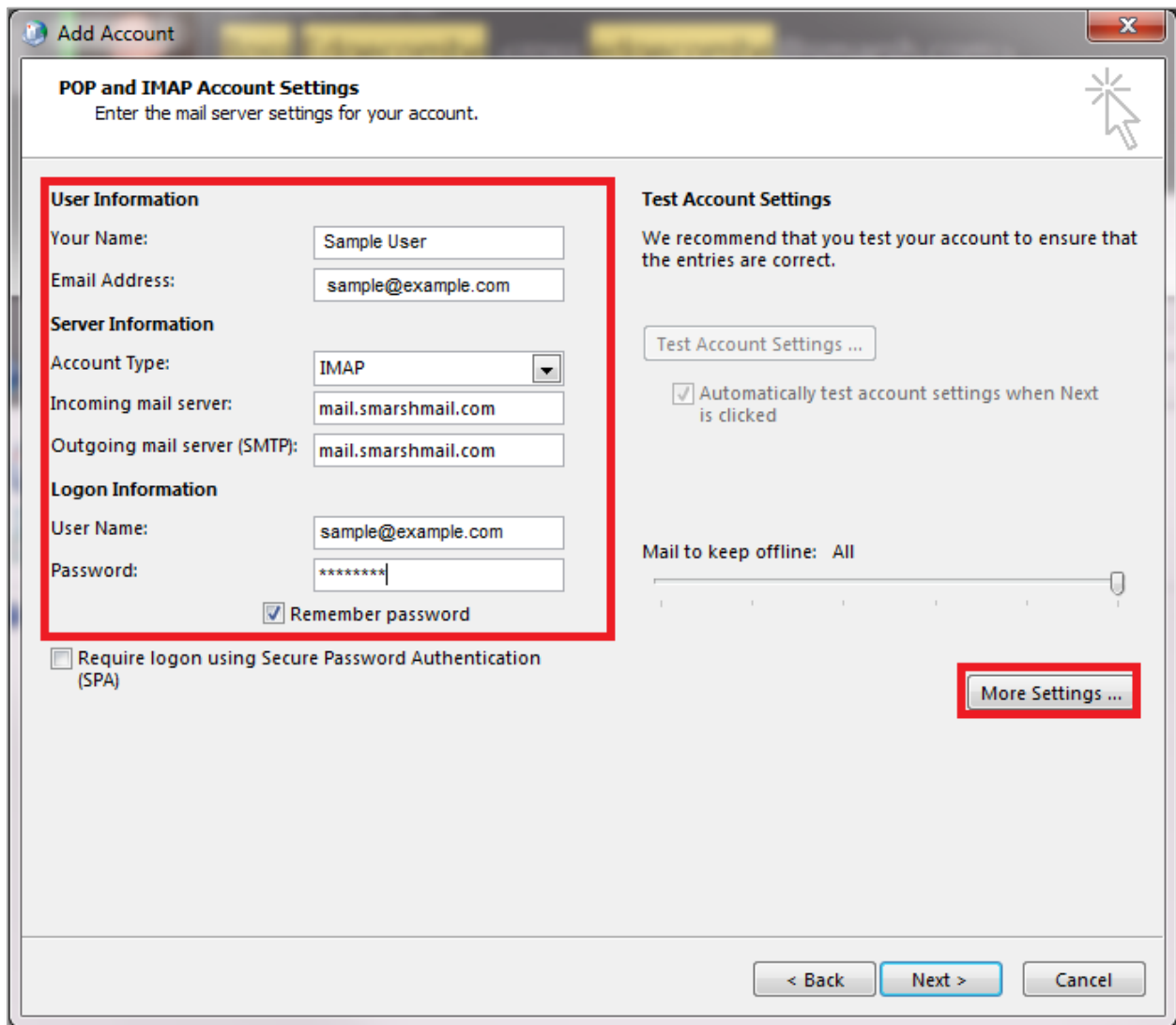


Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your **newly upgraded email address** in to the **Email Address** field (this should not have changed with the upgrade).
 - Change the **Account Type** selection from POP3 to **IMAP**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field.

- Once the above details have been selected and entered, click **More Settings**



Add Account

POP and IMAP Account Settings
Enter the mail server settings for your account.

User Information

Your Name:

Email Address:

Server Information

Account Type:

Incoming mail server:

Outgoing mail server (SMTP):

Logon Information

User Name:

Password:

☒ Remember password

☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings

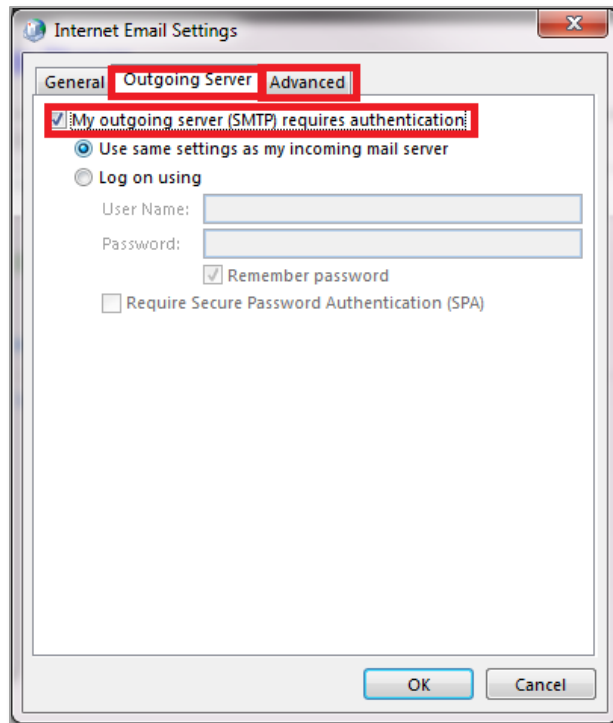
We recommend that you test your account to ensure that the entries are correct.

☒ Automatically test account settings when Next is clicked

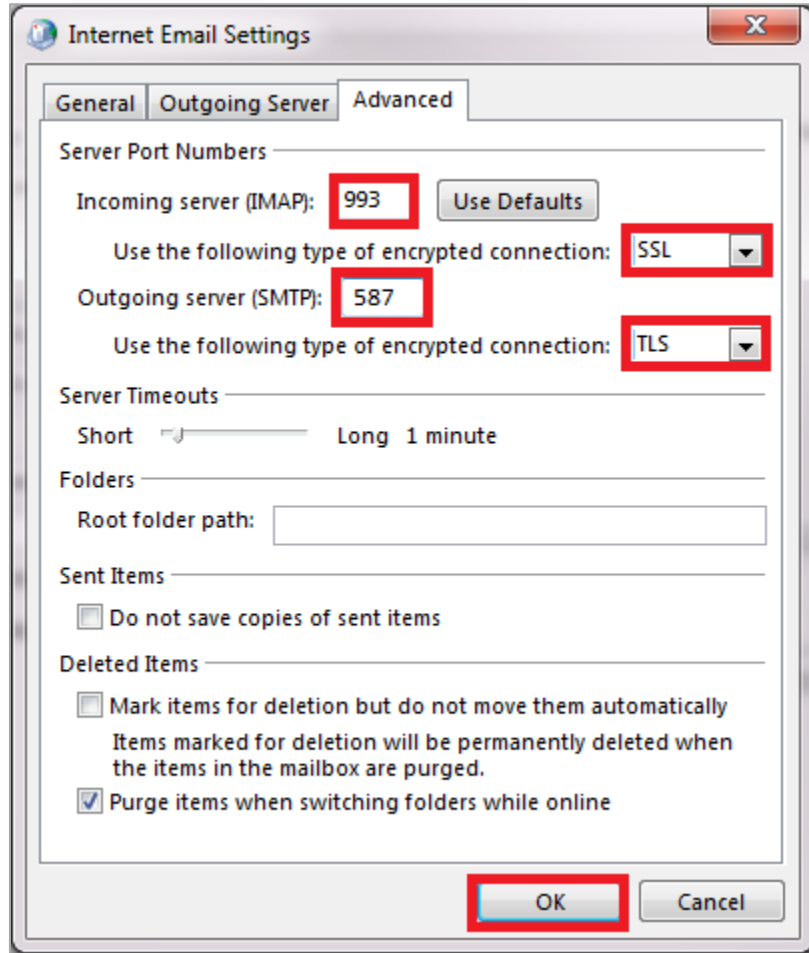
Mail to keep offline: All

< Back Next > Cancel

- In the Internet Email Settings window, select the **Outgoing Server** tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be checked by default. Continue to the **Advanced** tab in the Internet Email Settings window.



- In the Internet Email Settings window under the **Advanced** tab, complete the following changes:
 - In the Incoming server (IMAP) field, enter **993**.
 - In the Use the following type of encrypted connection field, select **SSL**.
 - In the Outgoing server (SMTP) field, enter **587**.
 - In the Use the following type of encrypted connection field, select **TLS**.



Internet Email Settings

General Outgoing Server **Advanced**

Server Port Numbers

Incoming server (IMAP): **993** Use Defaults

Use the following type of encrypted connection: **SSL**

Outgoing server (SMTP): **587**

Use the following type of encrypted connection: **TLS**

Server Timeouts

Short ☐ Long 1 minute

Folders

Root folder path:

Sent Items

☐ Do not save copies of sent items

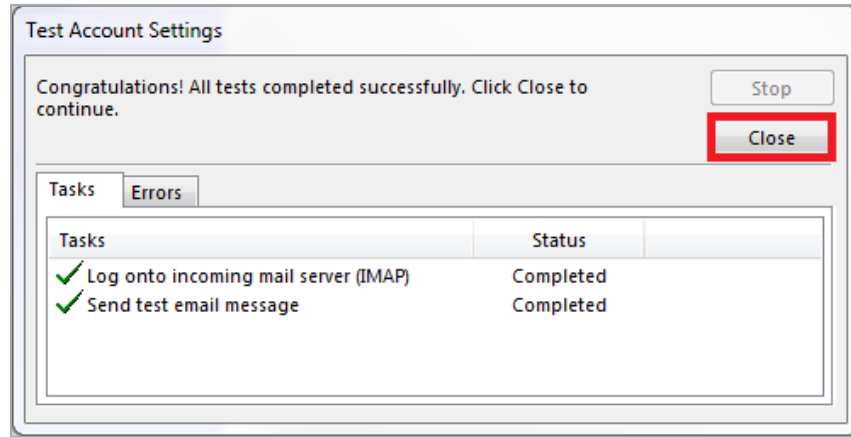
Deleted Items

☐ Mark items for deletion but do not move them automatically
Items marked for deletion will be permanently deleted when the items in the mailbox are purged.

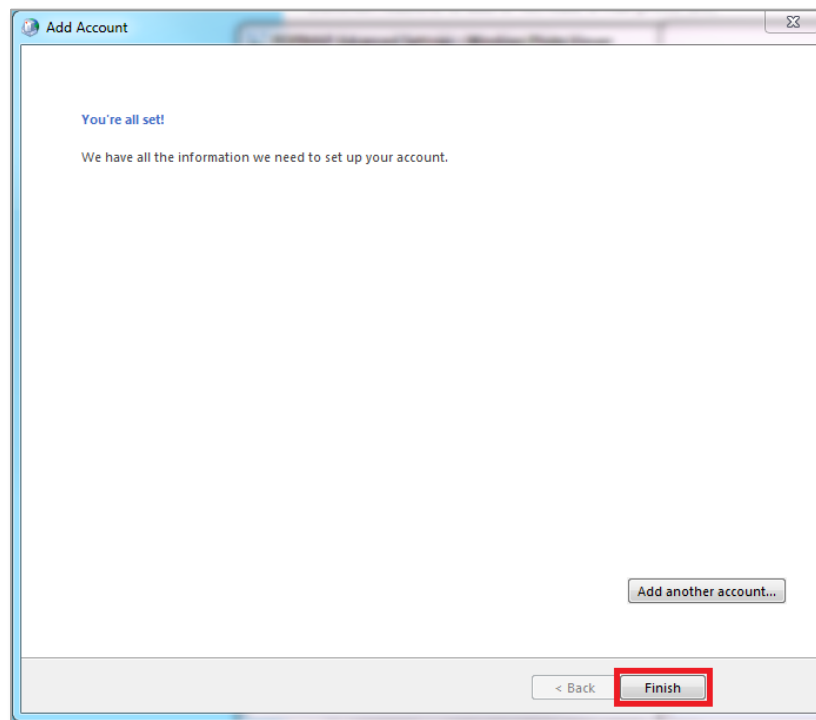
☒ Purge items when switching folders while online

OK Cancel

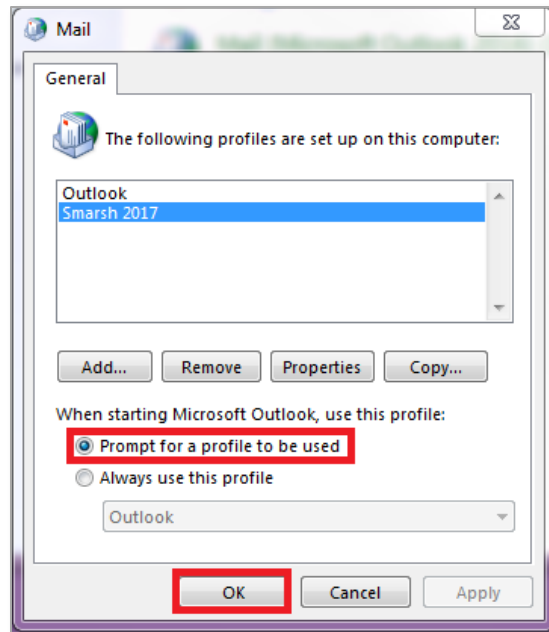
- Once the above details have been selected and entered, click **OK**.
- On the Add Account window, click **Next**. Windows will now attempt to log on to the incoming mail server (IMAP) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.



- If the tasks do not complete successfully, consider returning to the previous screen to confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



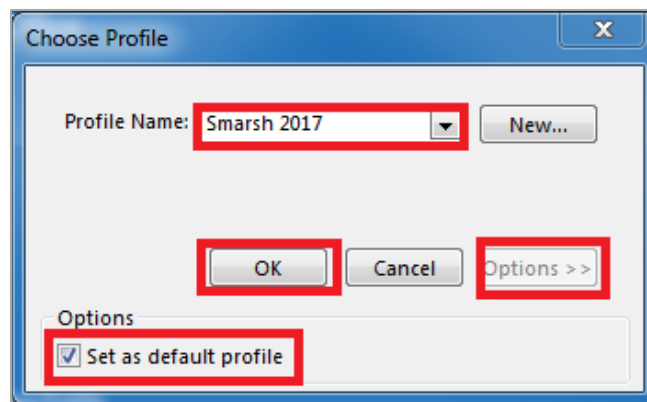
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure **Prompt for a profile to be used** is selected and click **OK**.



- Once you have verified that all email data is intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** selected.

Set Your New Outlook Profile as Default

- Start Outlook**; the Choose Profile window will appear. Select your **new profile** in the **Profile Name** field and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.

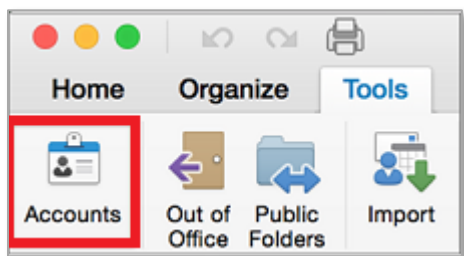


Continue to **Step 4: [Configure your Mobile Device\(s\)](#)**

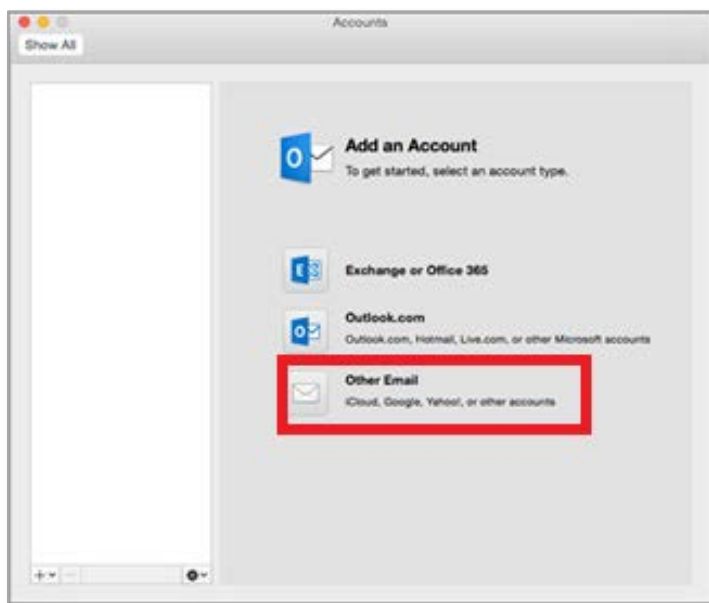
Apple Mac OS X 10.6+

IMAP to IMAP: Outlook for Mac 2016

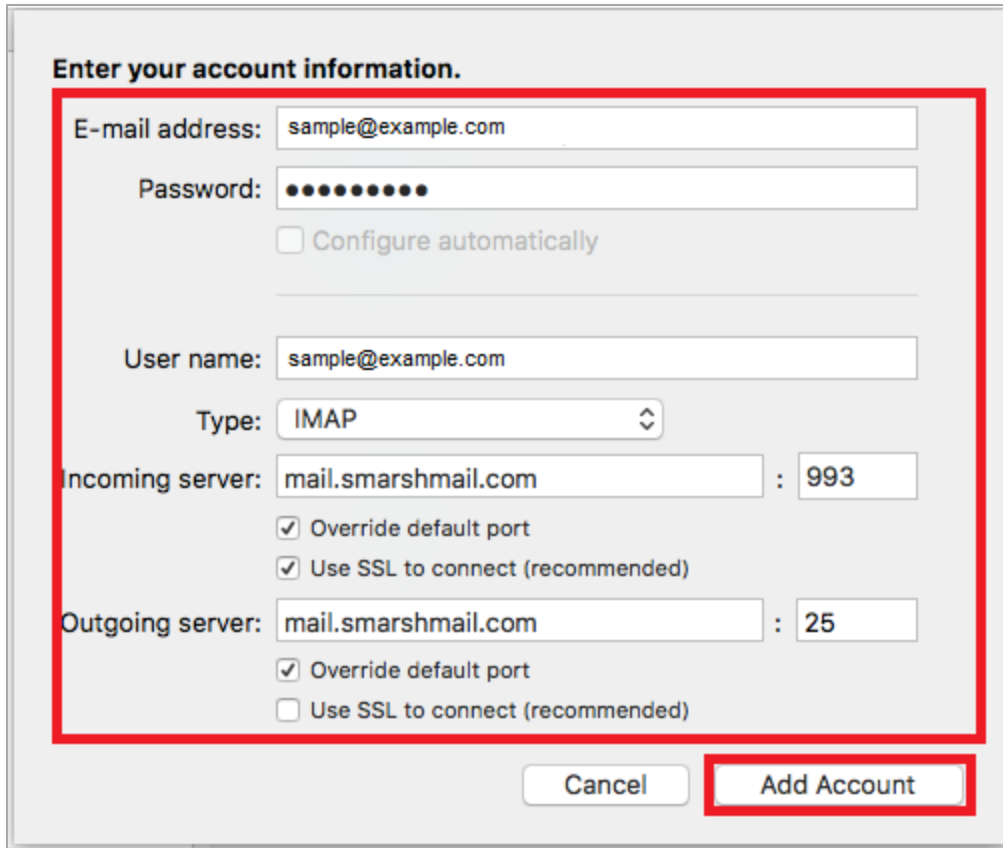
- **Launch Outlook.**
- From the **Tools** tab, click **Accounts**.



- In the **Accounts** box, click **Other Email**.



- Enter your **email address and password**.
- Enter the **mail server options as identified below** and click **Add Account**.



Enter your account information.

E-mail address:

Password:

☐ Configure automatically

User name:

Type:

Incoming server: :

☒ Override default port

☒ Use SSL to connect (recommended)

Outgoing server: :

☒ Override default port

☐ Use SSL to connect (recommended)

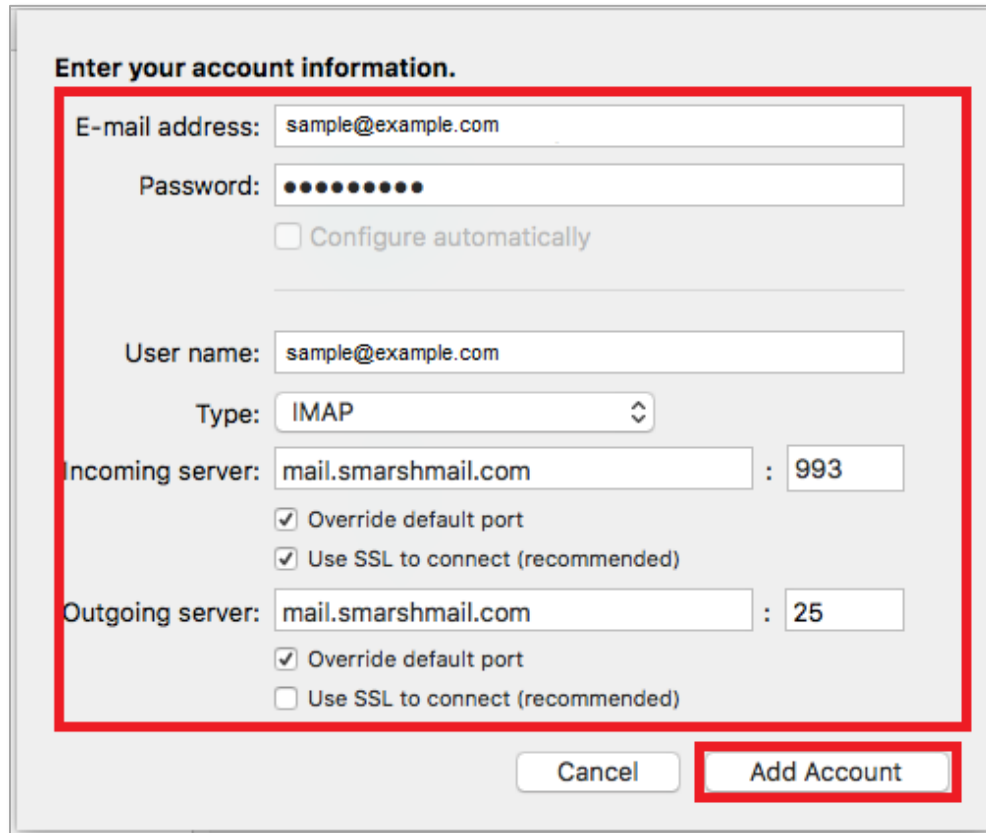
- Outlook will log in to your account and begin to download mail objects.
- **Select your new account**, click **Settings**, then select **Set as Default**.
- **Close** the Accounts window.

You now have both your old Smarsh Hosted Email Account and your New Smarsh Hosted Email Account provisioned. You will no longer be able to send or receive mail through your old account, but it can remain intact for historical purposes. If you have confirmed that all your email exists in both your old and new account, you may remove the old account from your Outlook configuration.

Continue to Step 4: [Configure your Mobile Device\(s\)](#)

IMAP to IMAP: Outlook for Mac 2011

- From the **Tools** menu, click **Accounts**.
- In the lower-left corner of the **Accounts** dialog box, click **Add +**, and then click **E-mail**.
- **Enter your email address and password along with the below server settings**, then click **Add Account**.



Enter your account information.

E-mail address:

Password:

☐ Configure automatically

User name:

Type:

Incoming server: :

☒ Override default port

☒ Use SSL to connect (recommended)

Outgoing server: :

☒ Override default port

☐ Use SSL to connect (recommended)

- Outlook will log in to your account and begin to download mail objects.
- **Select your new account** and click **Settings** and select **Set as Default**.
- **Close** the Accounts window.

You now have both your old Smarsh Hosted Email Account and your New Smarsh Hosted Email Account provisioned. You will no longer be able to send or receive mail through your old account, but it can remain intact for historical purposes. If you have confirmed that all your email exists in both your old and new account, you may remove the old account from your Outlook configuration.

Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

IMAP to IMAP: Apple Mail

Apple Mail does not allow for multiple connections for a single email account. You must:

- Export existing mail from Apple Mail
- Import old mail back into Apple Mail
- Remove your old mail account
- Add your new mail account

Export Existing Mail from Apple Mail

- Launch **Mail**.
- **Select your old Smarsh Hosted Services Mailbox**, then choose **Mailbox > Export Mailbox**.
- **Choose a folder or create a new folder**, then click **Choose**.
- Your mail file export will begin immediately. Wait for the file to appear as “INBOX.mbox” wherever you saved your export.
- **Exit Mail**.

Import Old Mail Back into Apple Mail

Any mail that was not stored on the server will need to be imported from the export file created previously. To import your mail items:

- Launch **Mail**.
- Click **File > Import Mailboxes**.
- Select **Apple Mail** and click **Continue**.
- **Locate your Exported Mailbox File** and click **Choose**.
- Your mail will import directly to Apple Mail. Click **Done**.

Imported mail will show up under the “Import” folder in the “On My Mac” section of Apple Mail. Utilize your new email account inbox for sending and receiving new messages.

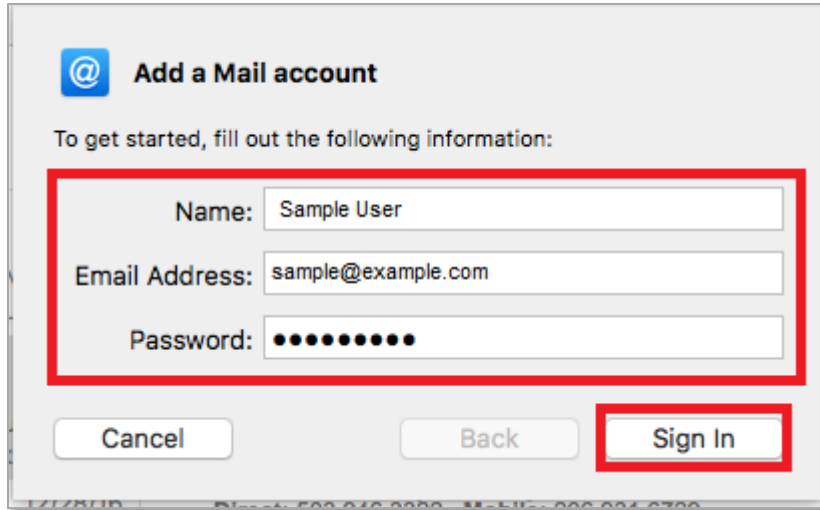
Remove Old Mail Account

CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

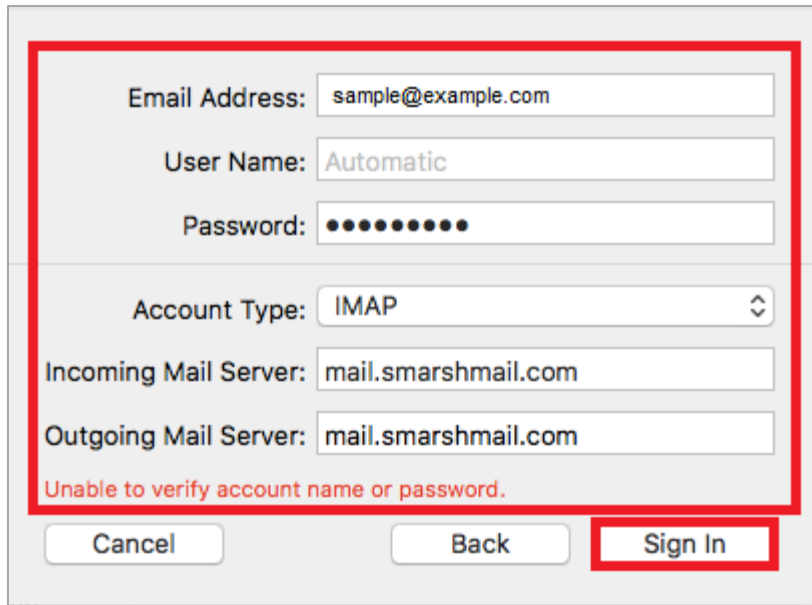
- Launch **Mail**.
- Click **Mail > Accounts**.
- Select your **Old Smarsh Email Account** and **click the minus symbol (–) or remove button**.
- Select **OK**.
- **Close the Internet Accounts** window.

Add New Mail Account

- With Mail open, click **Mail > Add Account**.
- From the list of account types select **Add Other Mail Account** and click **continue**.
- Enter your **Full Name, Email Address and Password**. When finished, click the **Create** or **Sign In** button.



- You will receive a message that the account is unable to verify your name or password. **Enter the following server details** and click **sign in**:



- Your mail account will now be taken online and your mail will begin to download from the server.

Continue to **Step 4:** [Configure your Mobile Device\(s\)](#)

Step 4: Make Configuration Changes to Mobile Devices

Configuration instructions for all mobile devices are linked below. As you work through these instructions, make sure to select **POP/IMAP** instead of Exchange as your mailbox is a POP/IMAP mailbox.

Prior to configuring your newly upgraded account, you will need to remove the account as configured previously.

- Connect Android Device to POP/IMAP Mailbox – [Click Here](#)
- Connect Apple iOS to POP/IMAP Mailbox – [Click Here](#)
- Connect Windows Phone to POP/IMAP Mailbox – [Click Here](#)
- Connect Blackberry to POP/IMAP Mailbox – [Click Here](#)

Note: If you connect a tablet to your Smarsh Hosted Email in addition to your phone, you will also need to configure that device. Android tablet users should follow the “Android Device” instructions. iPad users should follow the “Apple iOS” instructions.

Appendix 1: Basic POP/IMAP Settings

If you previously had a POP or IMAP mailbox and you are not able to provision using any of the instructions included, **please use the settings below to configure POP/IMAP:**

Protocol	Hostname	Port
POP3 with SSL	mail.smarshmail.com	995
IMAP with SSL	mail.smarshmail.com	993
SMTP with TLS	mail.smarshmail.com	587

Appendix 2: POP to POP Configuration Instructions

Post-Upgrade: POP to POP

Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, [IMAP is the recommended configuration for your connection to Exchange 2016.](#)

Microsoft Windows 7/8/10

POP to POP: Outlook 2013/2016

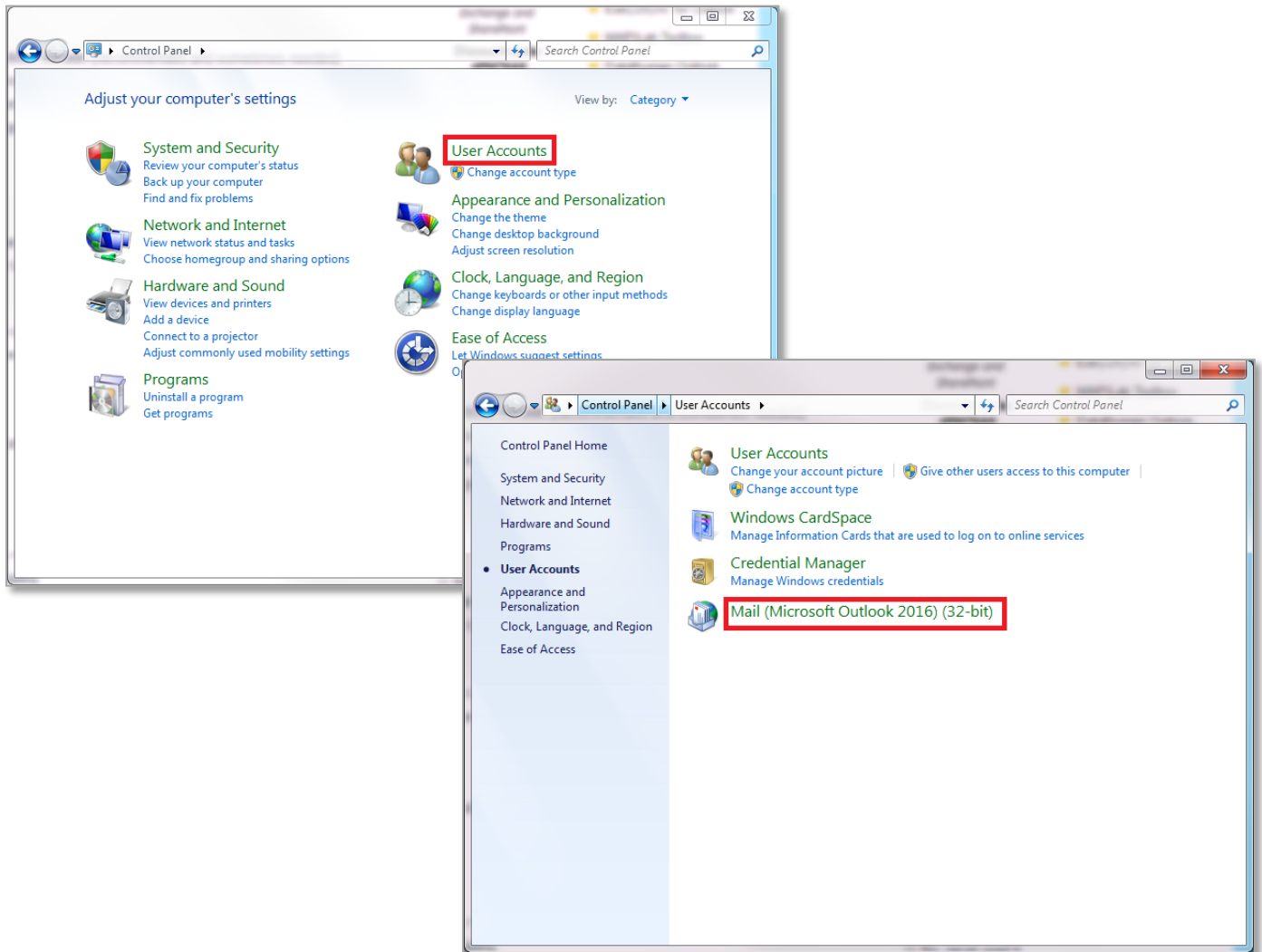
Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

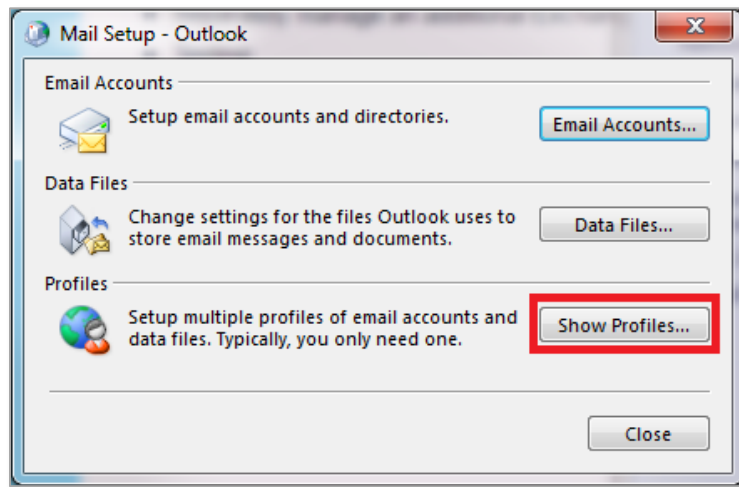
- Create a new Outlook profile
- Export data from your old Outlook profile
- Import data to the new Outlook profile
- Set your new profile as default

Provision a New Outlook Profile

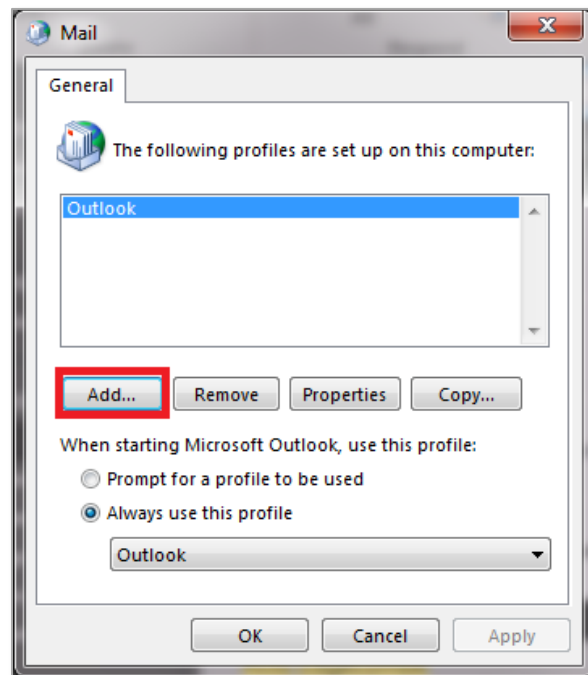
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



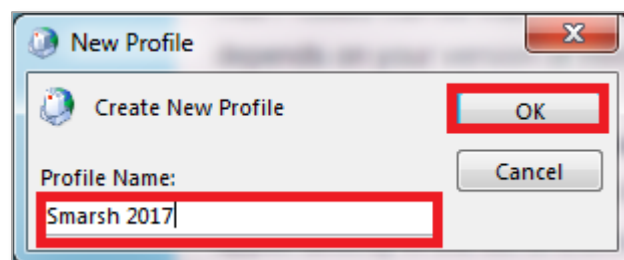
- Once the Mail Setup page appears, select **Show Profiles**.



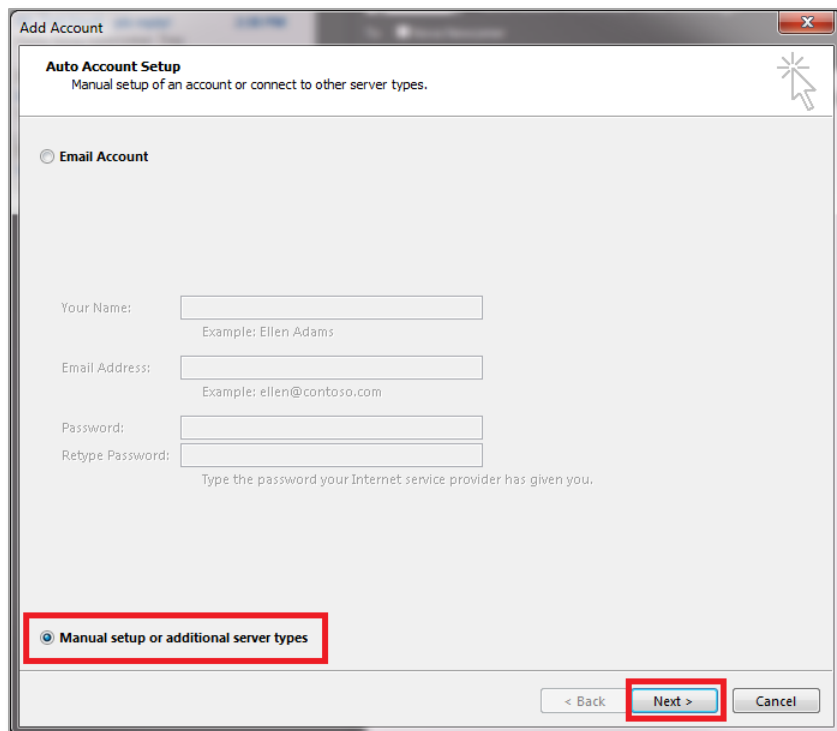
- In the Mail window, click **Add** to create a new Outlook Profile.



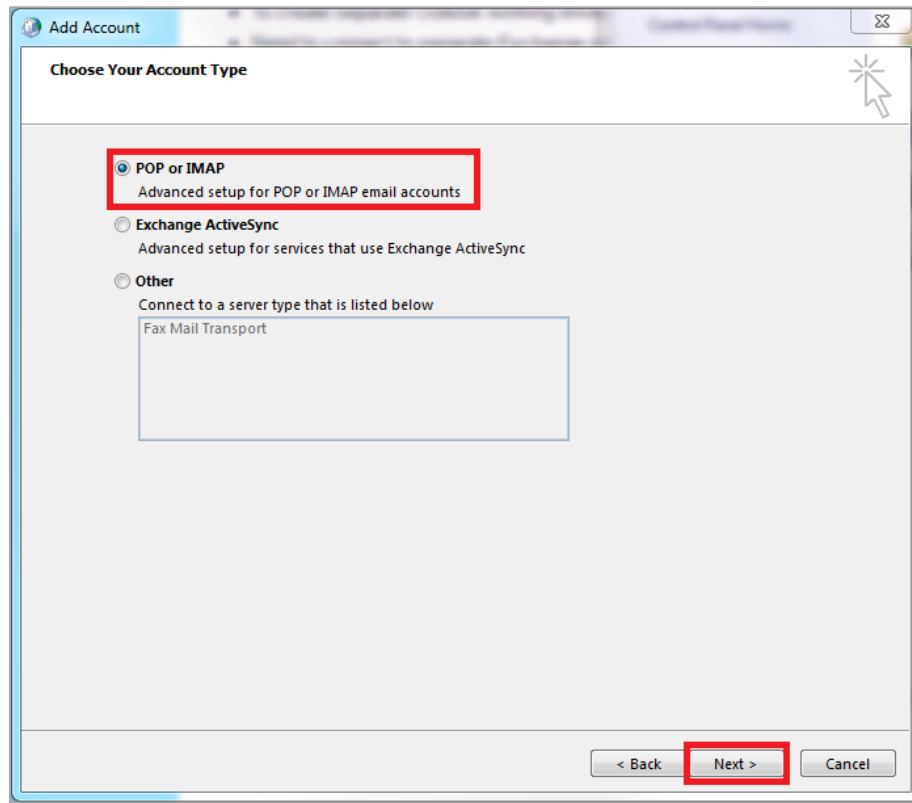
- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



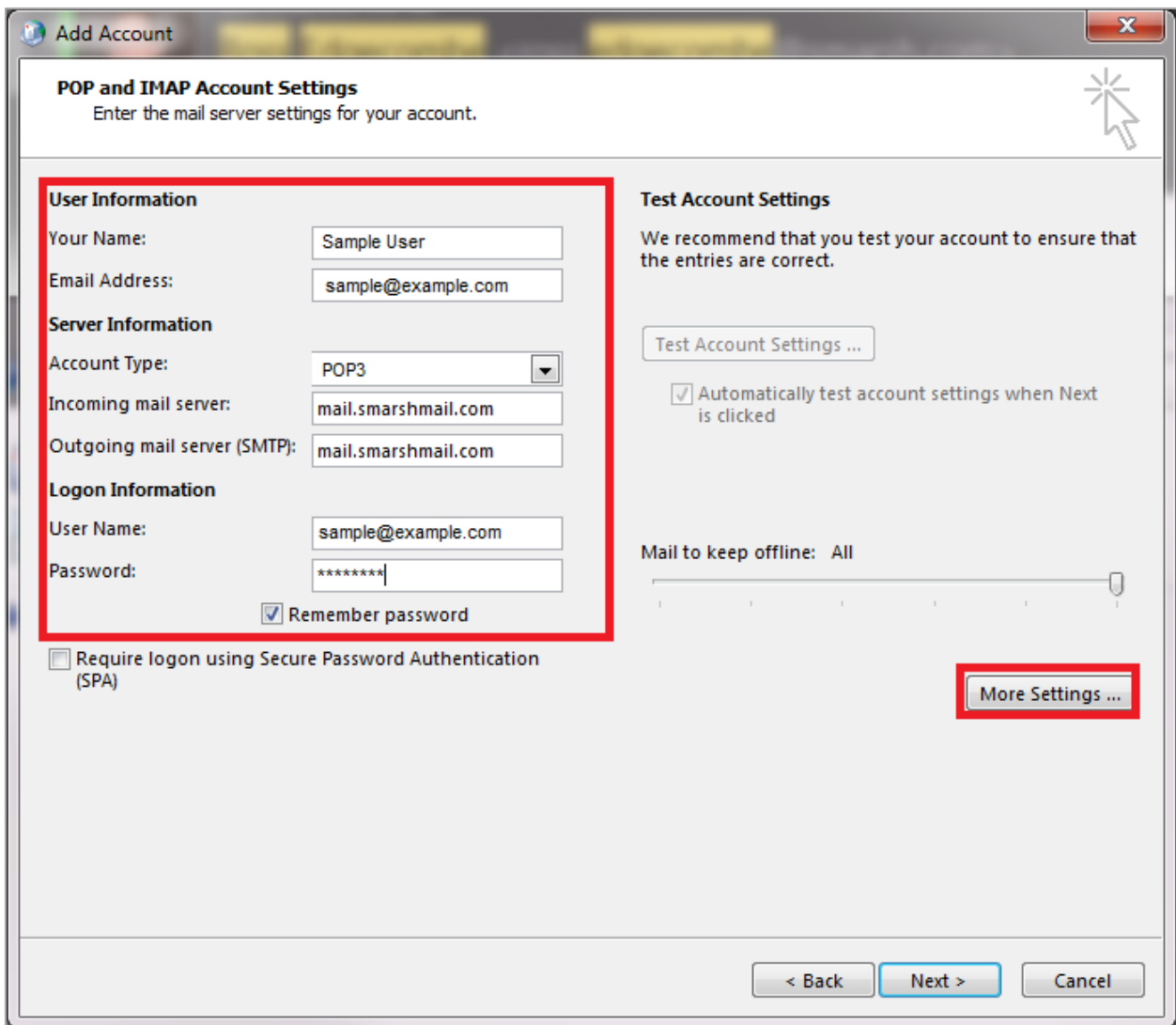
- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, Email Account will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.



- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your **newly upgraded email address** in to the **Email Address** field (your email address should be unchanged).
 - Set the **Account Type** to **POP3**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should be unchanged).
- Once the above details have been selected and entered, click **More Settings**.



The screenshot shows a window titled "Add Account" with a sub-header "POP and IMAP Account Settings". Below the sub-header is the instruction "Enter the mail server settings for your account." The window is divided into two main sections: "User Information" and "Test Account Settings".

User Information: This section is highlighted with a red border. It contains the following fields:

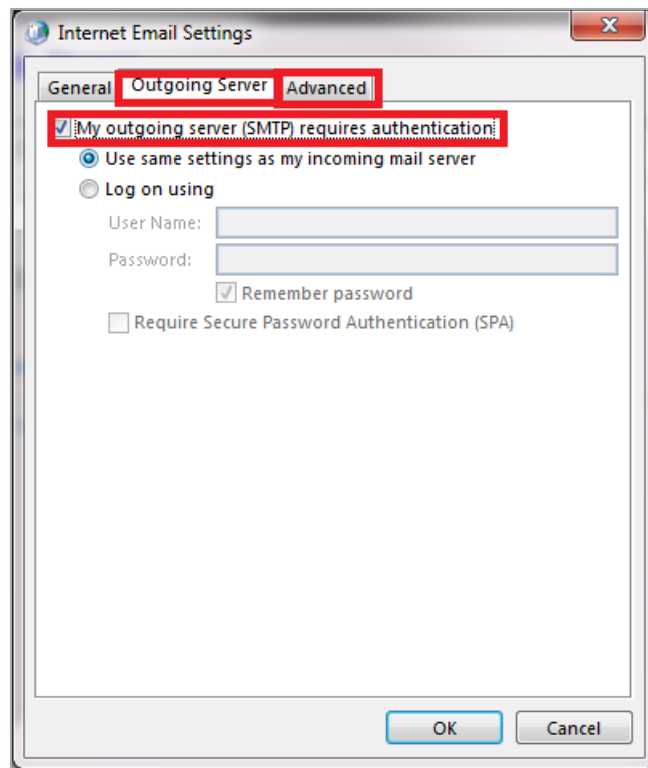
- Your Name:** Sample User
- Email Address:** sample@example.com
- Server Information:**
 - Account Type:** POP3 (selected from a dropdown menu)
 - Incoming mail server:** mail.smarshmail.com
 - Outgoing mail server (SMTP):** mail.smarshmail.com
- Logon Information:**
 - User Name:** sample@example.com
 - Password:** *****
 - ☒ Remember password
- ☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings: This section contains the following elements:

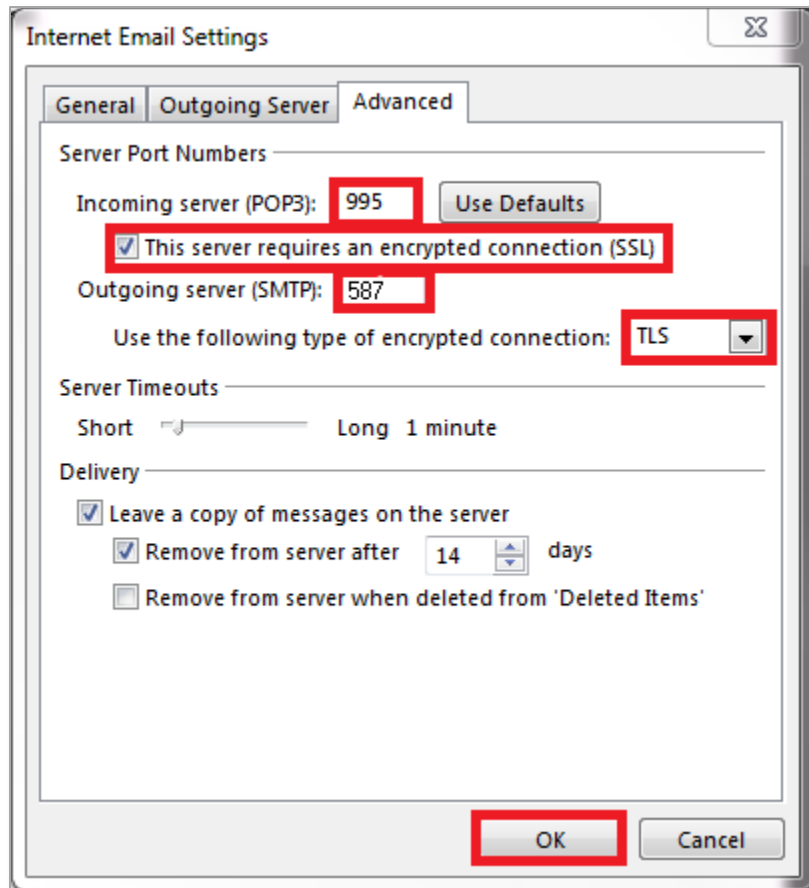
- A message: "We recommend that you test your account to ensure that the entries are correct."
- A button: "Test Account Settings ..."
- A checkbox: ☒ Automatically test account settings when Next is clicked
- A slider control: "Mail to keep offline: All"
- A button: "More Settings ..." (highlighted with a red border)

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

- In the Internet Email Settings window, select the **Outgoing Server** tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be selected by default. Continue to the **Advanced** tab in the Internet Email Settings window.



- In the Internet Email Settings window under **Advanced** tab, complete the following changes:
 - In the Incoming server (POP3) field, enter **995**.
 - Check the box for **This server requires an encrypted connection (SSL)**.
 - In the Outgoing server (SMTP) field, enter **587**.
 - In the Use the following type of encrypted connection field, select **TLS**.



Internet Email Settings

General | **Outgoing Server** | Advanced

Server Port Numbers

Incoming server (POP3): **995** Use Defaults

☒ **This server requires an encrypted connection (SSL)**

Outgoing server (SMTP): **587**

Use the following type of encrypted connection: **TLS**

Server Timeouts

Short ————— Long 1 minute

Delivery

☒ Leave a copy of messages on the server

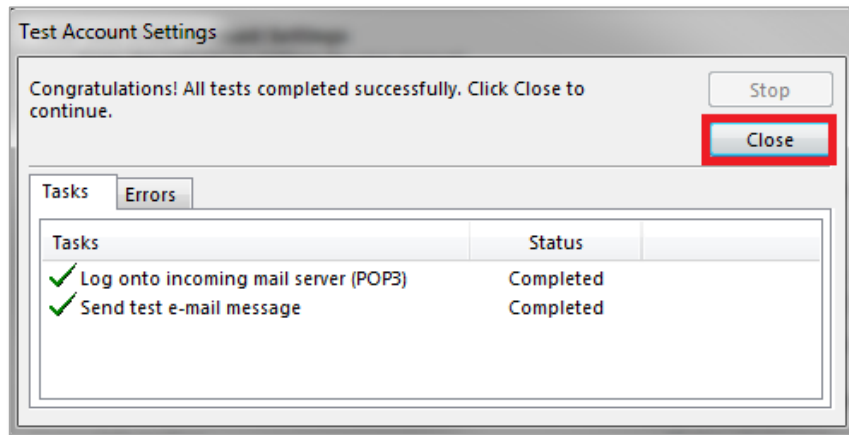
☒ Remove from server after 14 days

☐ Remove from server when deleted from 'Deleted Items'

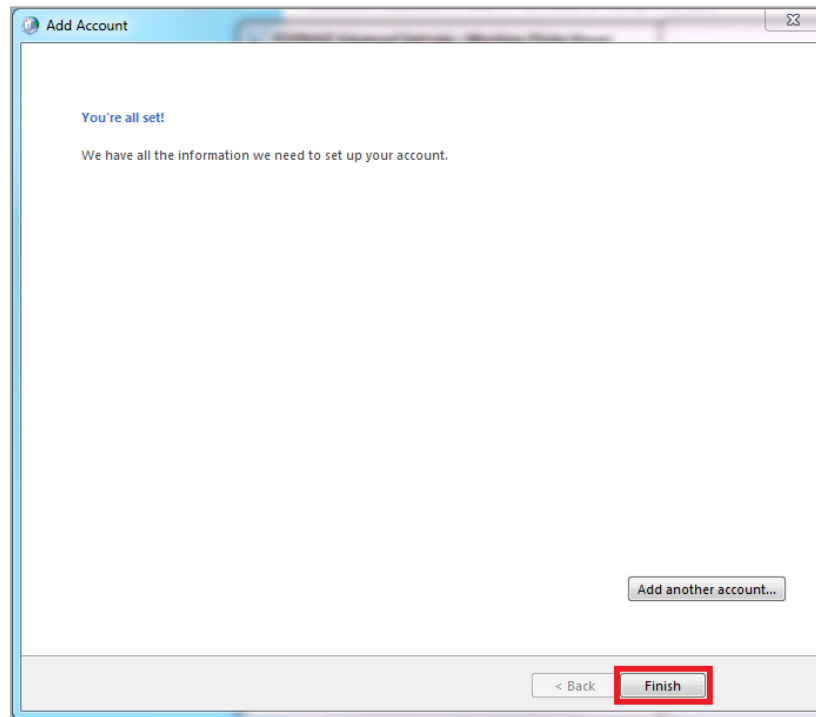
OK Cancel

- Once the above details have been selected and entered, click **OK**.

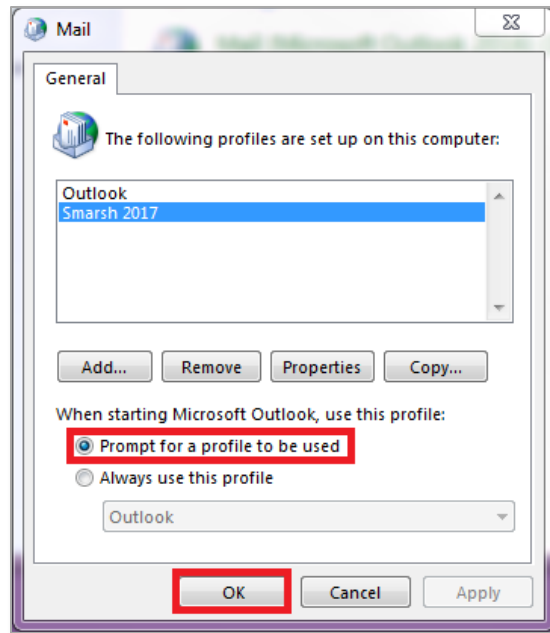
- On the Add Account window, click **Next**. Windows will now attempt to log onto the incoming mail server (POP3) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.



- If the tasks do not complete successfully, consider returning to the previous screen to confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



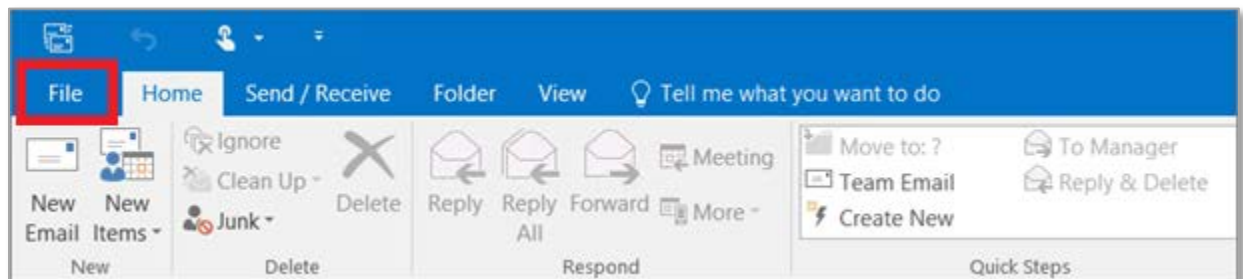
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure **Prompt for a profile to be used** is selected and click **OK**.



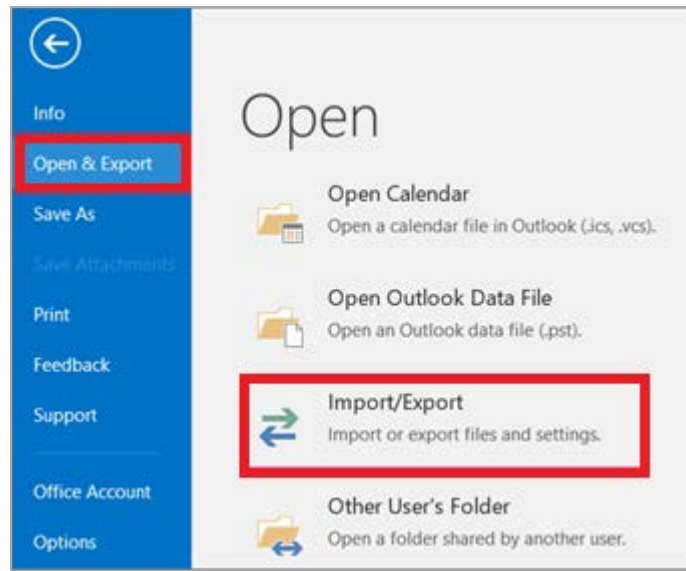
- Once all email data has been verified to be intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** selected.

Export POP Data to .PST

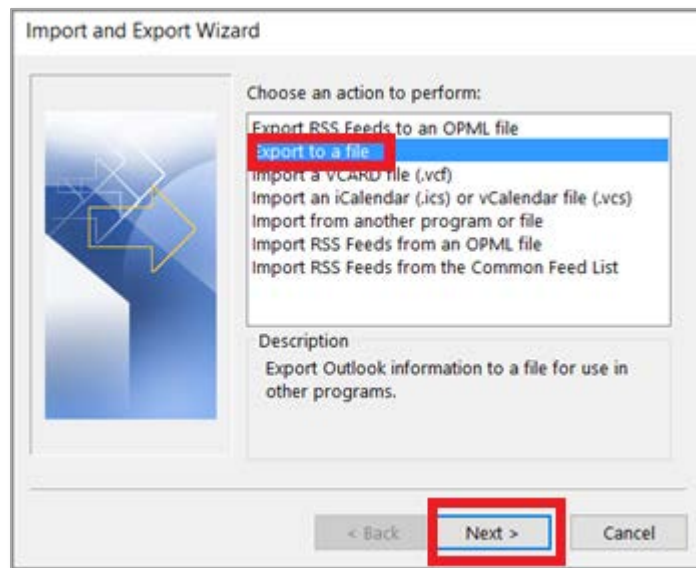
- Start Outlook, the Choose Profile window will appear. **Select your old profile in the Profile Name field** and click **OK**.
- At the top of your Outlook ribbon, choose **File**.



- Choose **Open & Export > Import/Export**.

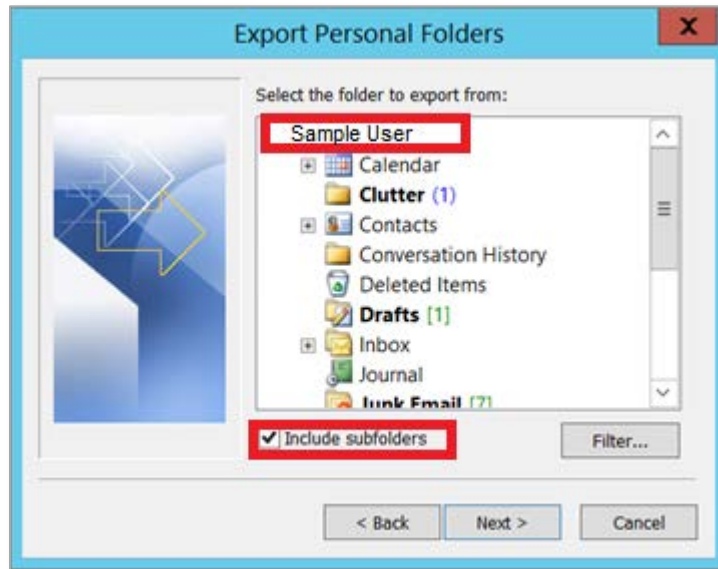


- Choose **Export to a file** and click **Next**.



- Click **Outlook Data File (.pst)**, and then click **Next**.

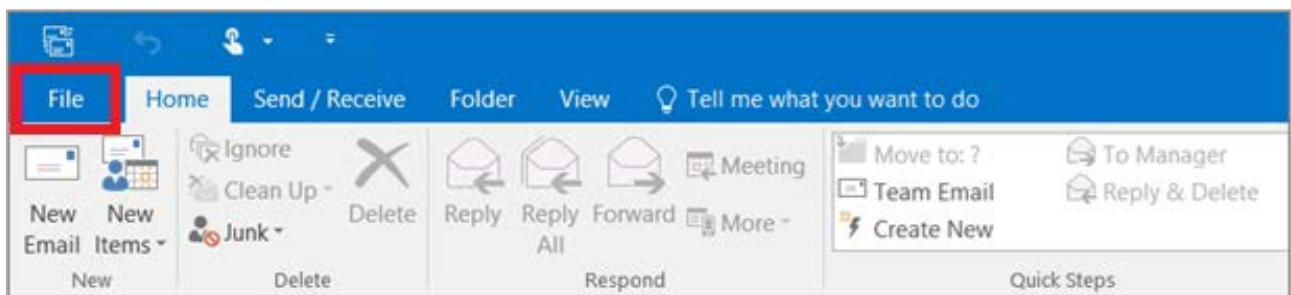
- Select the **name of the email account to export**. Make sure that the **Include subfolders check box is selected**. This way everything in the account will be exported: Calendar, Contacts, and Inbox. Click **Next**.



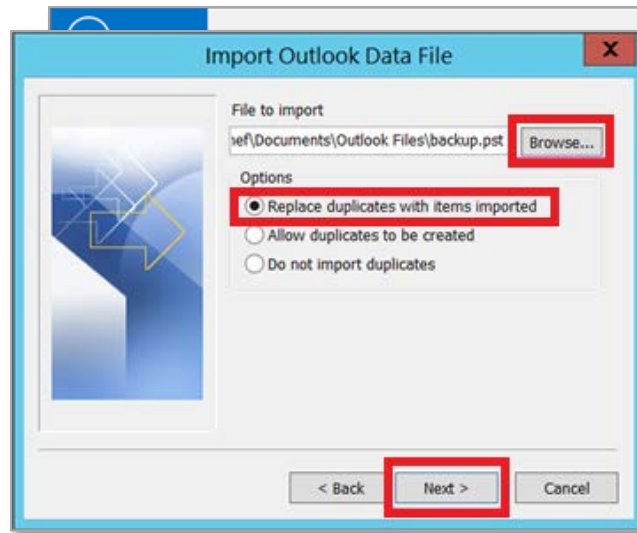
- Click **Browse** to select where to save the Outlook Data File (.pst). **Type a file name**, and then click **OK** to continue. **Note:** If you've used Export before, the previous folder location and file name appear. Type a different file name before clicking OK. Click **Finish**.
 - Outlook begins the export immediately unless a new Outlook Data File (.pst) is created or a password-protected file is used.
 - If you're creating an Outlook Data File (.pst), an optional password can help protect the file. When the Create Outlook Data File dialog box appears, type the password in the **Password** and **Verify Password** fields, then click **OK**. In the Outlook Data File Password dialog box, type the password, and then click **OK**.
- Once the .pst export has completed, **Exit Outlook**.

Import POP Data from .pst

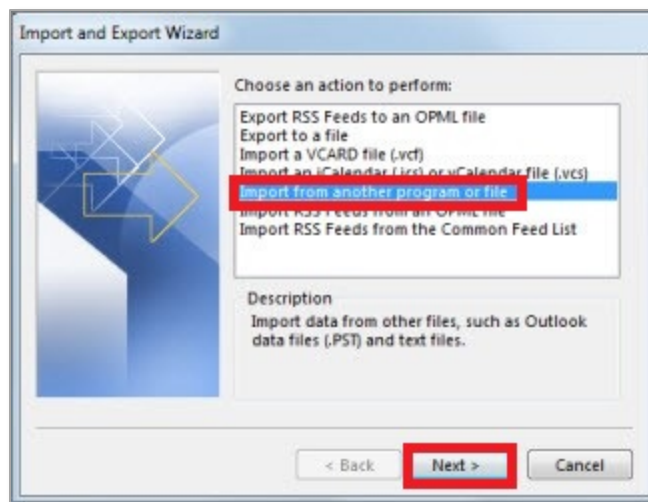
- Start Outlook, the Choose Profile window will appear. **Select your new profile in the Profile Name field** and click **OK**.
- At the top of your Outlook 2016 or 2013 ribbon, choose **File**.



- Choose **Open & Export > Import/Export**. This starts the Import and Export Wizard.



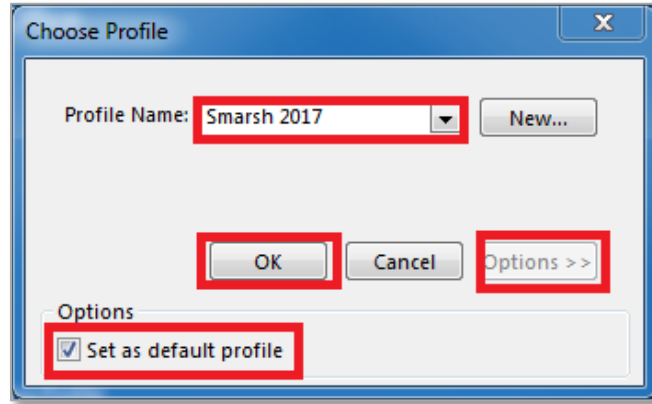
- Choose **Import from another program or file**, and then click **Next**.



- Choose **Outlook Data File (.pst)** and click **Next**.
- Browse** to the .pst file you want to import. Under **Options**, choose how you want to deal with emails and contacts, then choose **Next**.
- If a password was assigned to the Outlook Data File (.pst), enter the password, and then click **OK**.
- Choose **Import items into the current folder**. This imports the data into the folder currently selected.
- Choose **Finish**. Outlook starts importing your data immediately. You'll know it's finished when the progress box closes.
- Verify the contents of your new mailbox profile**. You should now be connected to your new Exchange 2016 services with all your historical data intact and at your fingertips.
- Once verified, **Exit Outlook**.

Set Your New Outlook Profile as Default

- **Start Outlook**; the Choose Profile window will appear. Select your **new profile** from the **Profile Name** dropdown and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



POP to POP: Outlook 2010

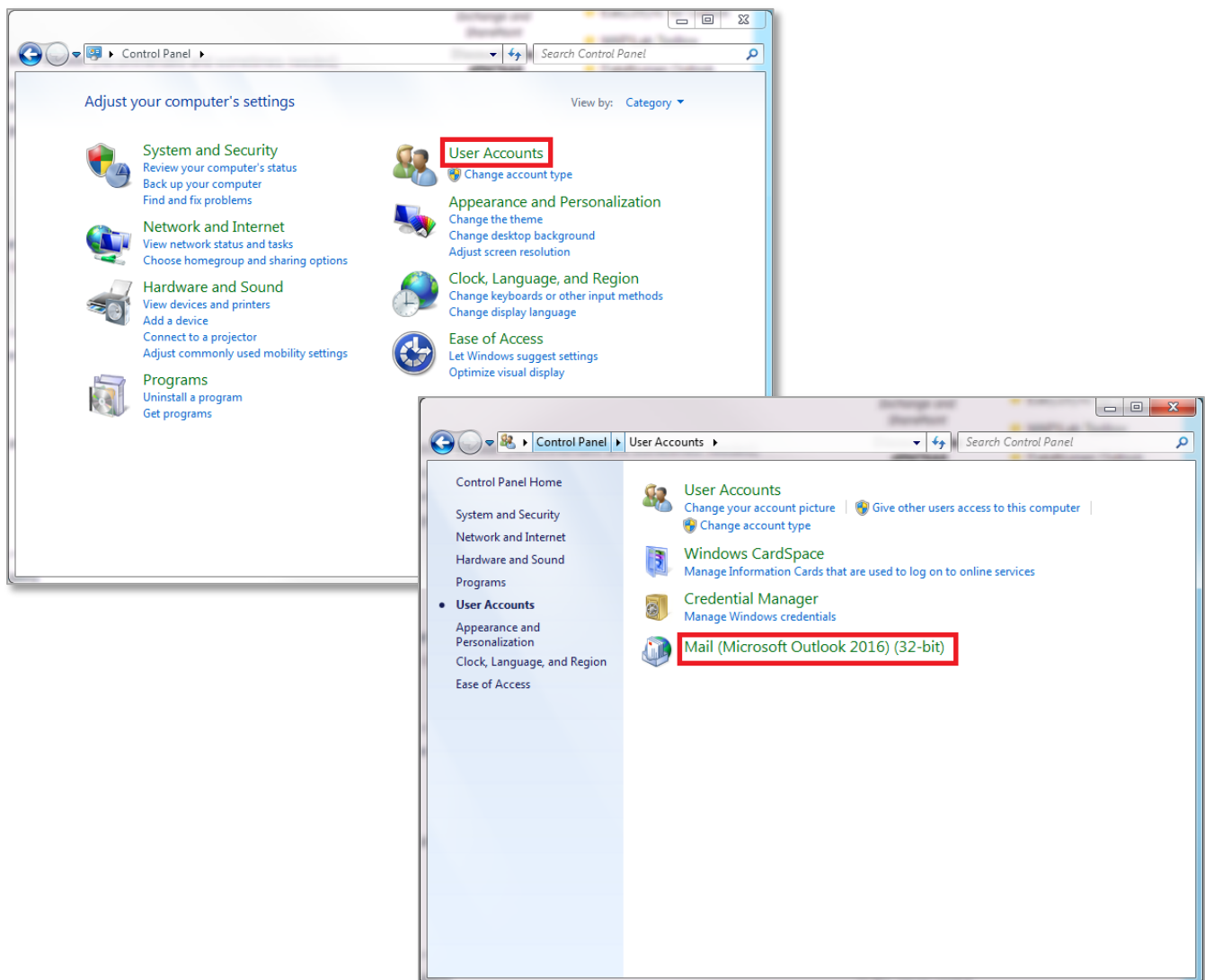
Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

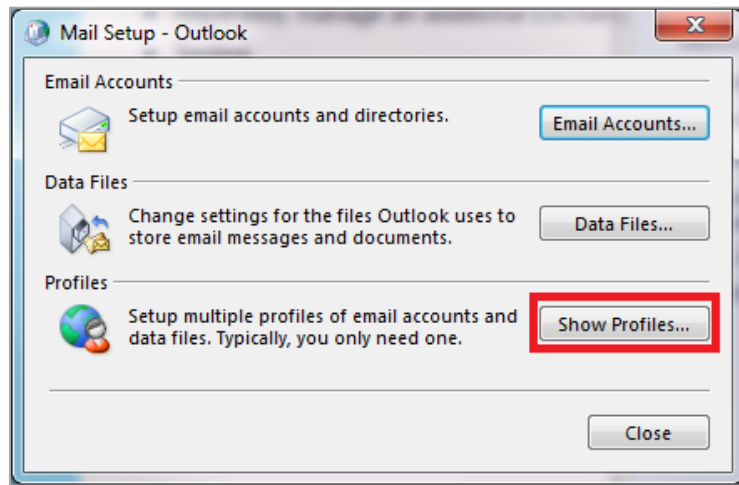
- Create a new Outlook profile
- Export data from your old Outlook profile
- Import data to the new Outlook profile
- Set your new profile as default

Provision a New Outlook Profile

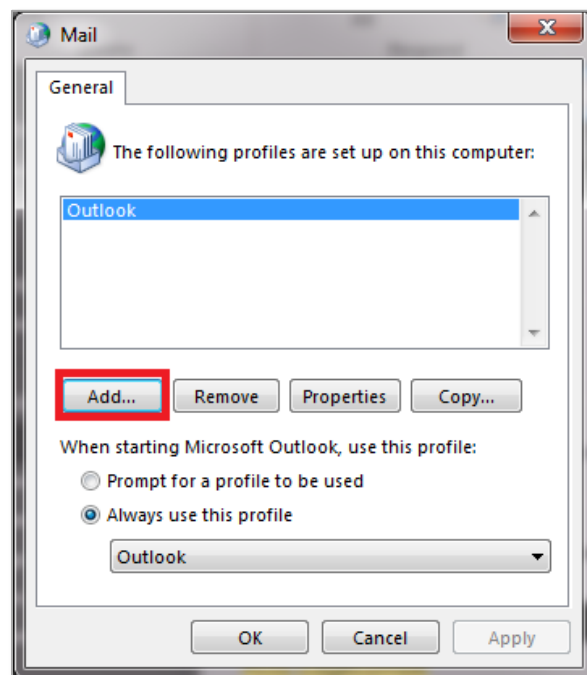
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



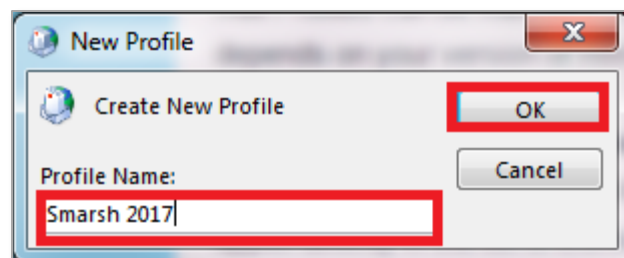
- Once the Mail Setup page appears, select **Show Profiles**.



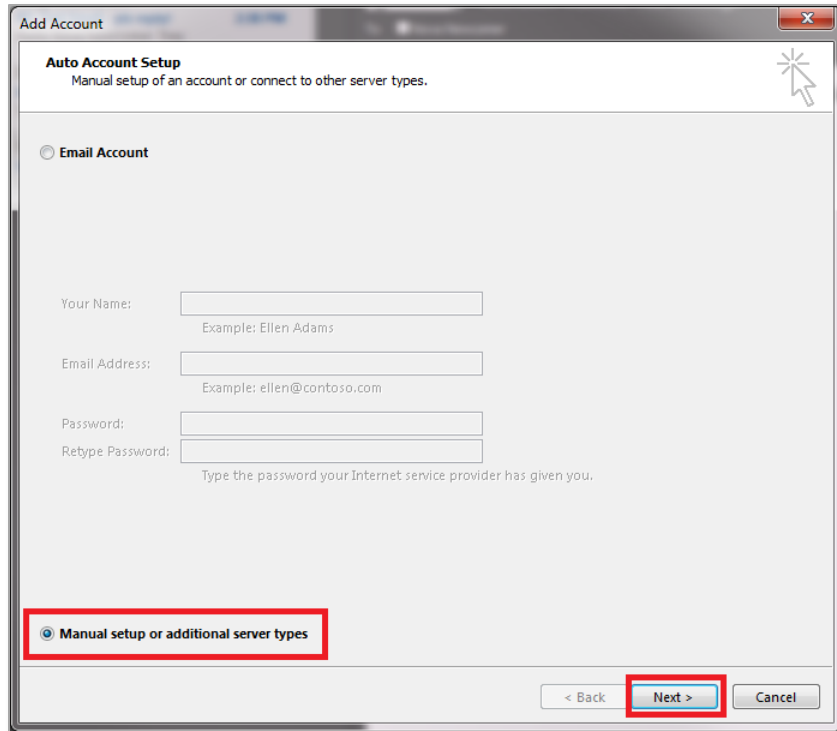
- In the Mail window, click **Add** to create a new Outlook Profile.



- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, Email Account will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.



Add Account

Auto Account Setup
Manual setup of an account or connect to other server types.

☐ Email Account

Your Name:
Example: Ellen Adams

Email Address:
Example: ellen@contoso.com

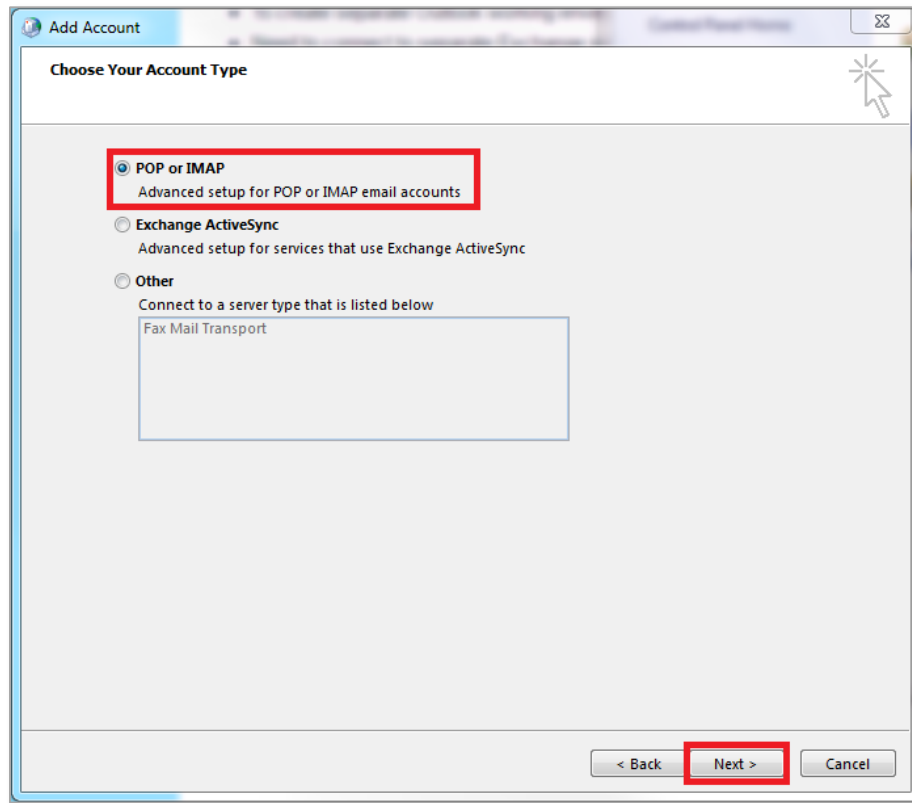
Password:

Retype Password:
Type the password your Internet service provider has given you.

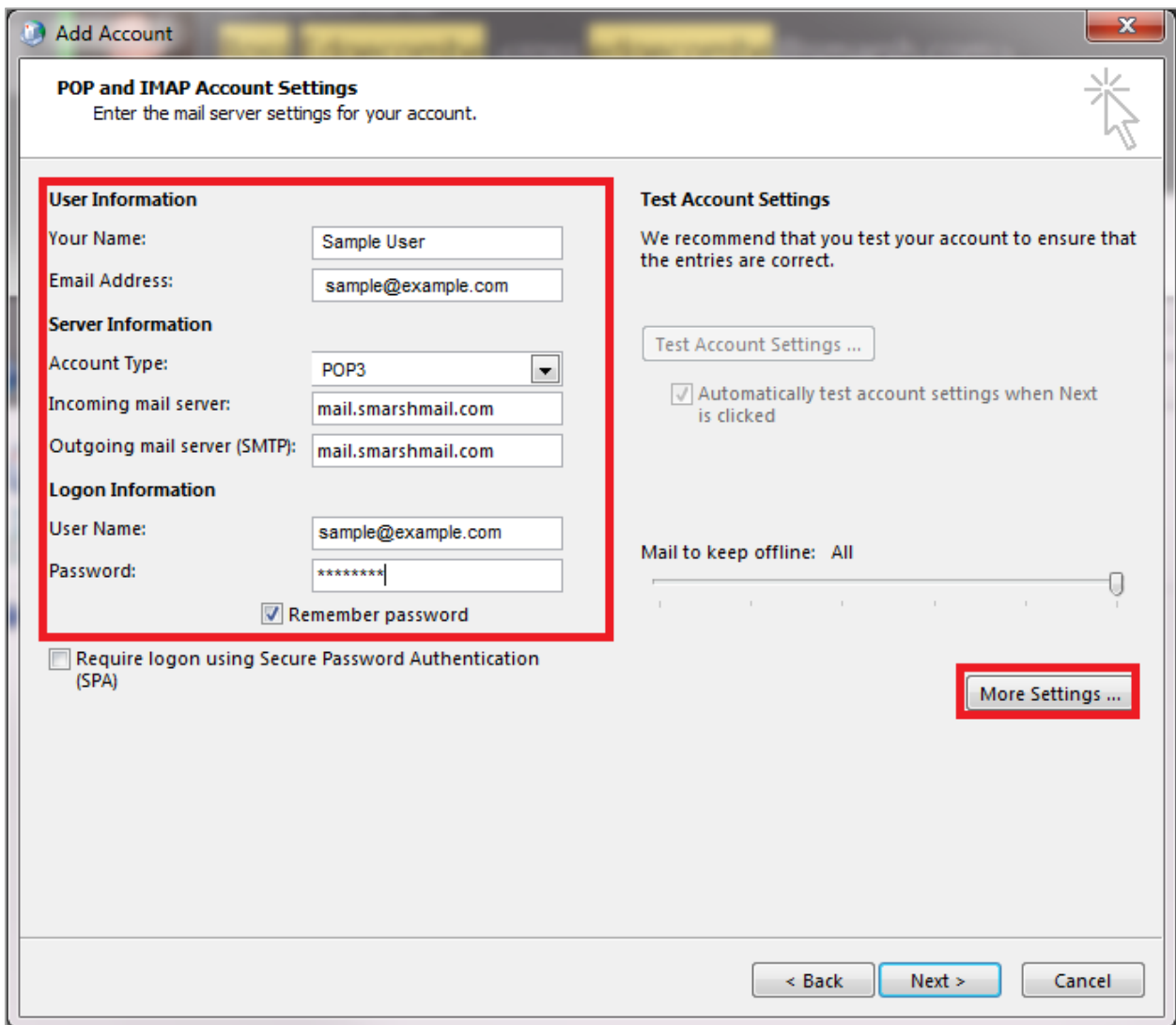
☒ Manual setup or additional server types

< Back **Next >** Cancel

- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your **newly upgraded email address** in to the **Email Address** field (your email address should be unchanged).
 - Set the **Account Type** to **POP3**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should be unchanged).
- Once the above details have been selected and entered, click **More Settings**.



The screenshot shows a window titled "Add Account" with a sub-header "POP and IMAP Account Settings". Below the sub-header is the instruction "Enter the mail server settings for your account." and a mouse cursor icon. The window is divided into two main sections: "User Information" and "Test Account Settings".

User Information (highlighted with a red border):

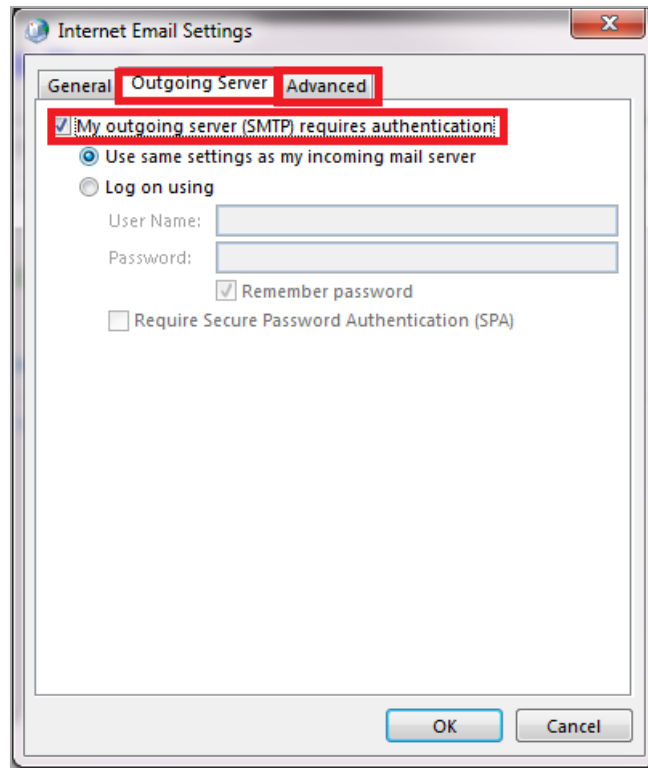
- Your Name:** Sample User
- Email Address:** sample@example.com
- Server Information:**
 - Account Type:** POP3 (selected from a dropdown menu)
 - Incoming mail server:** mail.smarshmail.com
 - Outgoing mail server (SMTP):** mail.smarshmail.com
- Logon Information:**
 - User Name:** sample@example.com
 - Password:** *****
 - ☒ Remember password
- ☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings:

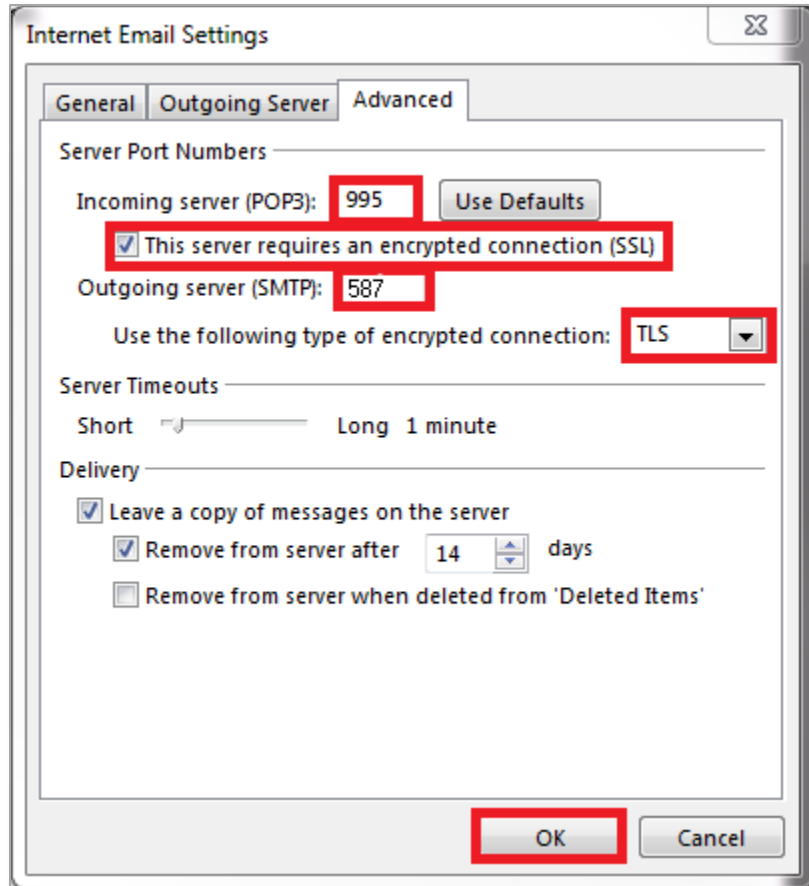
- We recommend that you test your account to ensure that the entries are correct.
-
- ☒ Automatically test account settings when Next is clicked
- Mail to keep offline:** All (with a slider control)
- (highlighted with a red border)

At the bottom of the window are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

- In the Internet Email Settings window, select the **Outgoing Server** tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be selected by default. Continue to the **Advanced** tab in the Internet Email Settings window.



- In the Internet Email Settings window under **Advanced** tab, complete the following changes:
 - In the Incoming server (POP3) field, enter **995**.
 - Check the box for **This server requires an encrypted connection (SSL)**.
 - In the Outgoing server (SMTP) field, enter **587**.
 - In the Use the following type of encrypted connection field, select **TLS**.



Internet Email Settings

General Outgoing Server **Advanced**

Server Port Numbers

Incoming server (POP3): **995** Use Defaults

☒ **This server requires an encrypted connection (SSL)**

Outgoing server (SMTP): **587**

Use the following type of encrypted connection: **TLS**

Server Timeouts

Short Long 1 minute

Delivery

☒ Leave a copy of messages on the server

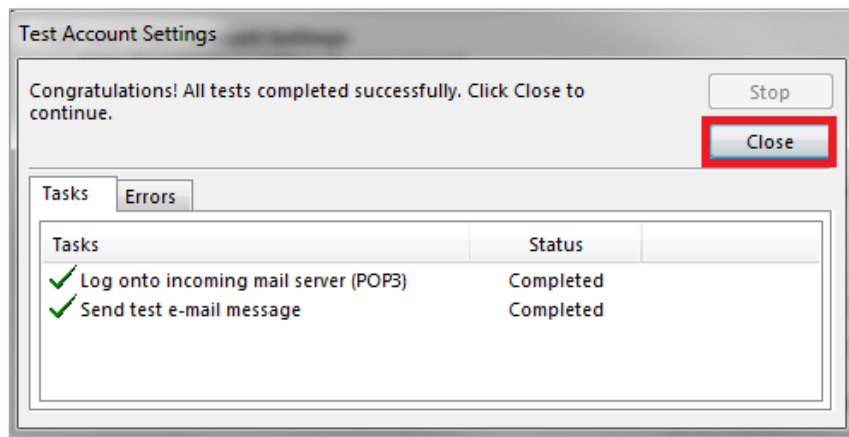
☒ Remove from server after 14 days

☐ Remove from server when deleted from 'Deleted Items'

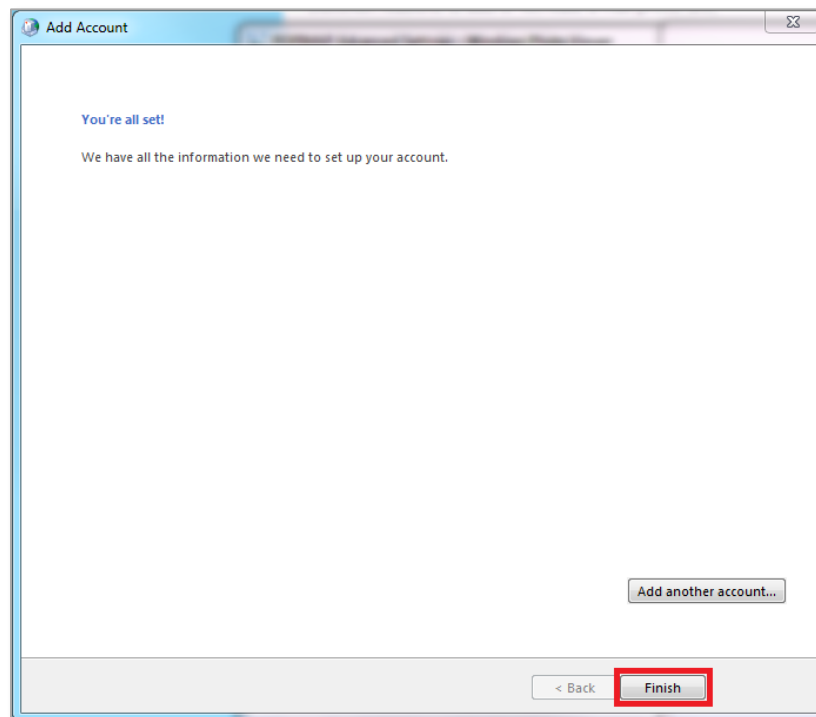
OK Cancel

- Once the above details have been selected and entered, click **OK**.

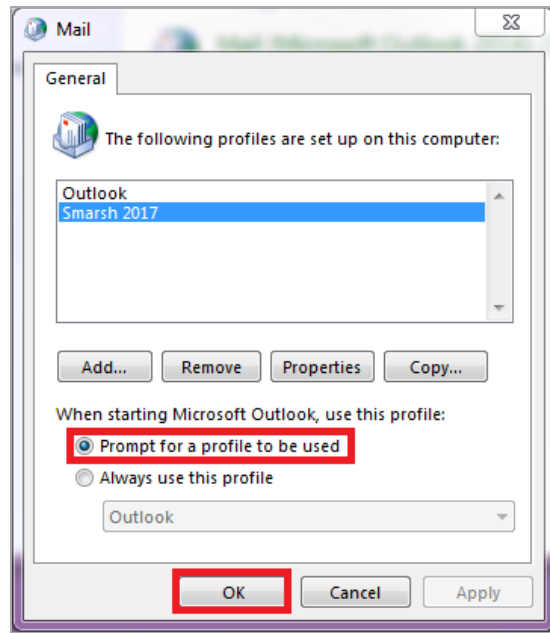
- On the Add Account window, click **Next**. Windows will now attempt to log onto the incoming mail server (POP3) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.



- If the tasks do not complete successfully, consider returning to the previous screen to confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



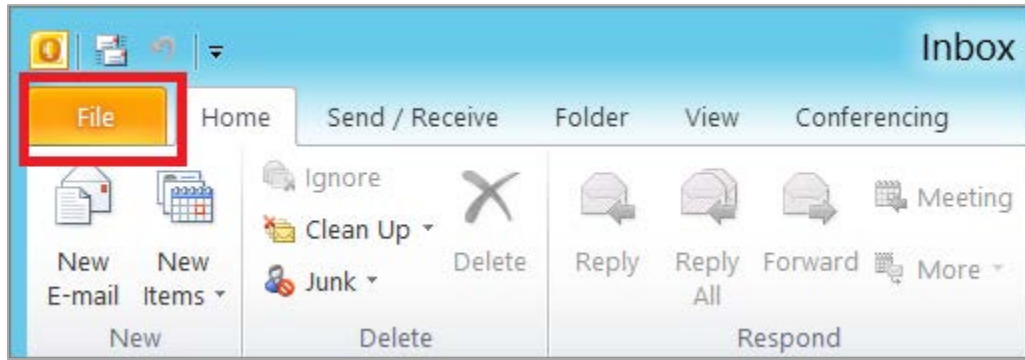
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure **Prompt for a profile to be used** is selected and click **OK**.



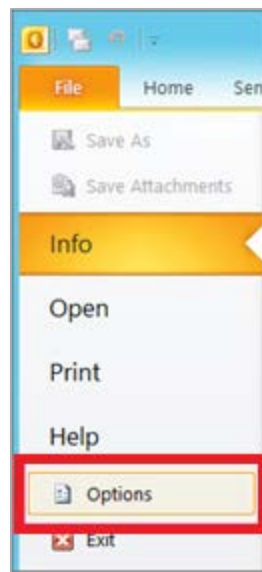
- Once all email data has been verified to be intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** selected.

Export POP Data to .PST

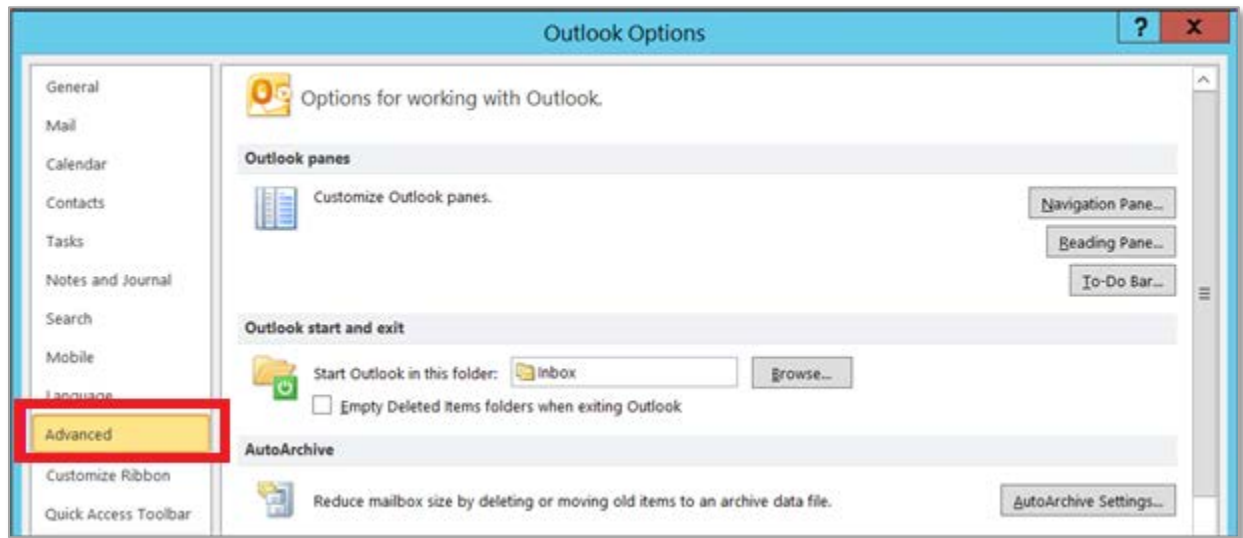
- **Start Outlook;** the Choose Profile window will appear. **Select your old profile in the Profile Name field** and click **OK**.
- At the top of your Outlook ribbon, choose the **File** tab.



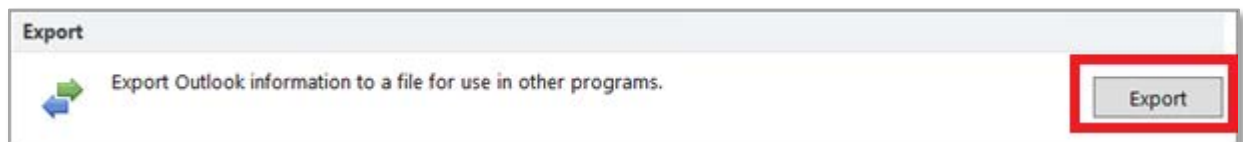
- Choose **Options**.



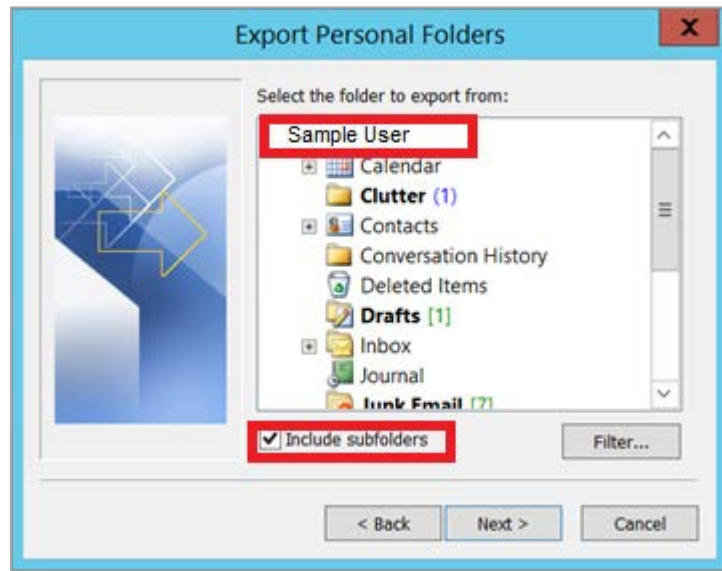
- In the Outlook Options box, choose **Advanced**.



- Under the Export section, choose **Export**.



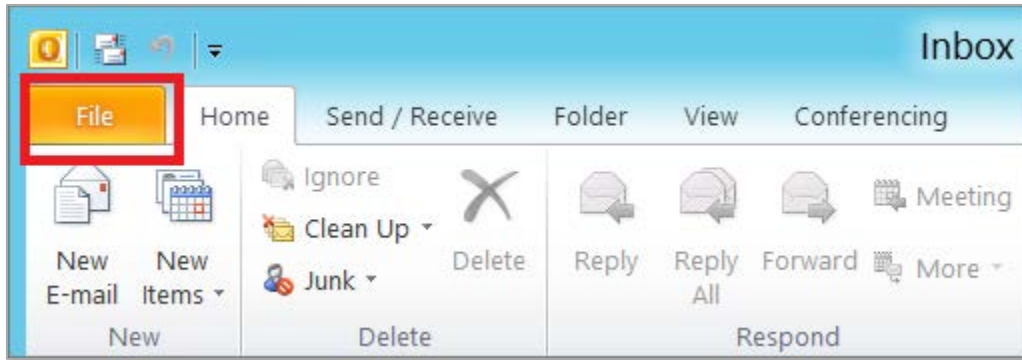
- Click **Export to a file**, and then click **Next**.
- Click **Outlook Data File (.pst)**, and then click **Next**.
- **Select the name of the email account to export**, as shown in the picture below. Make sure that the **Include subfolders** check box is selected. This way everything in the account will be exported: Calendar, Contacts, and Inbox. Click **Next**.



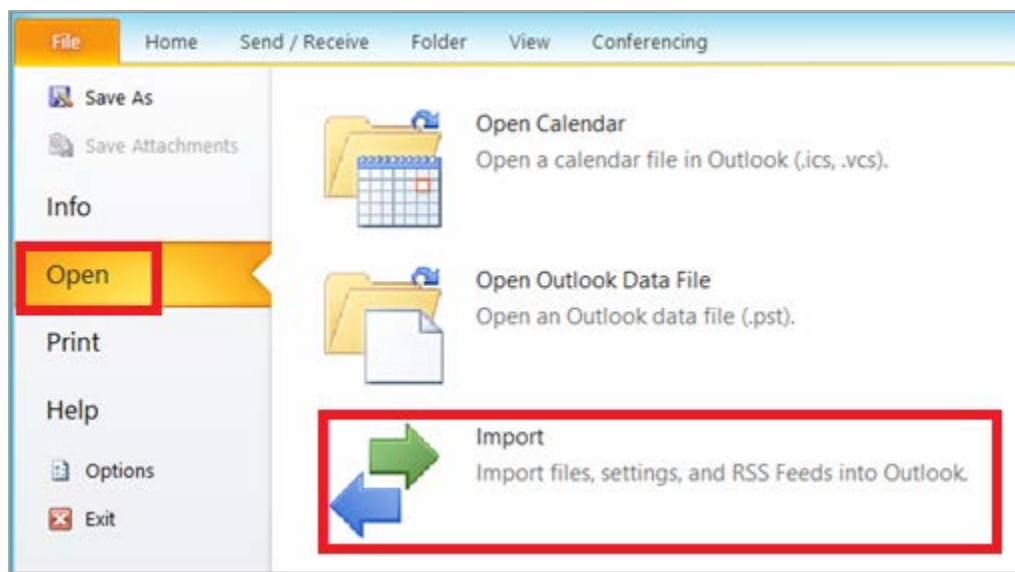
- Click **Browse** to select where you want to save the Outlook Data File (.pst) and to enter a file name. Click **OK** to continue.
 - **Note:** If you have previously used the export feature, the previous folder location and file name appear. Make sure that you change the file name if you want to create a new file instead of using the existing file.
 - If you are exporting to an existing Outlook Data File (.pst), under Options, specify what to do when exporting items that already exist in the file.
- Click **Finish**.
- The export begins immediately unless a new Outlook Data File (.pst) is created or the export is to an existing file that is password protected.
 - If you are creating a new Outlook Data File (.pst), an optional password can help protect the file. When the Create Outlook Data File dialog box appears, enter the password in the **Password** and **Verify Password** boxes, and then click **OK**. In the Outlook Data File Password dialog box, enter the password, and then click **OK**.
 - If you are exporting to an existing Outlook Data File (.pst) that is password protected, in the Outlook Data File Password dialog box, enter the password, and then click **OK**.
- Once the .pst export has completed, **Exit Outlook**.

Import POP Data from .pst

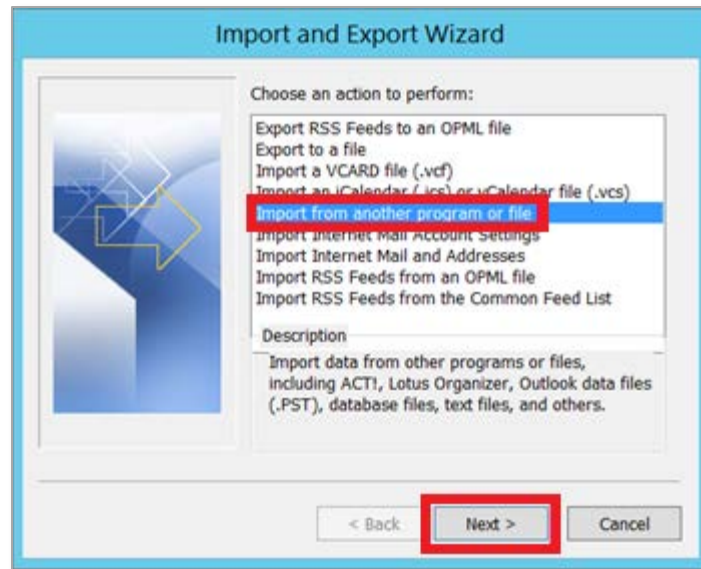
- Start Outlook; the Choose Profile window will appear. Select your new profile from the **Profile Name** dropdown and click **OK**.
- At the top of your Outlook ribbon, choose the **File** tab.



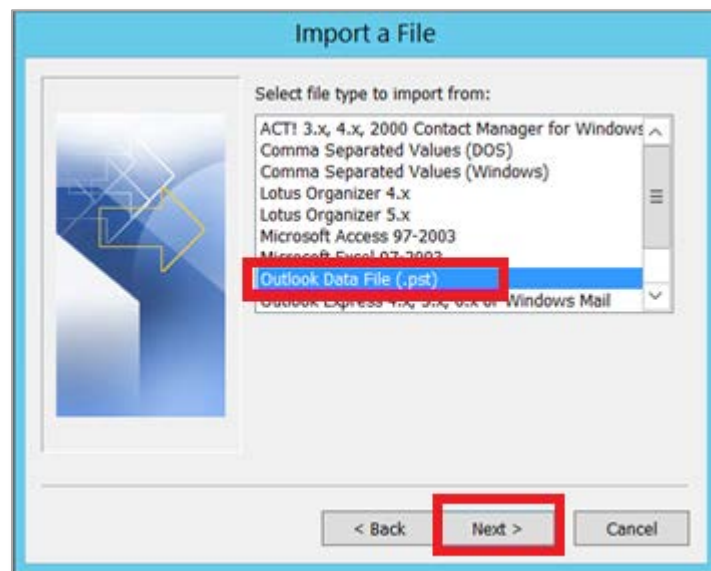
- Choose **Open > Import**. This starts the Import and Export Wizard.



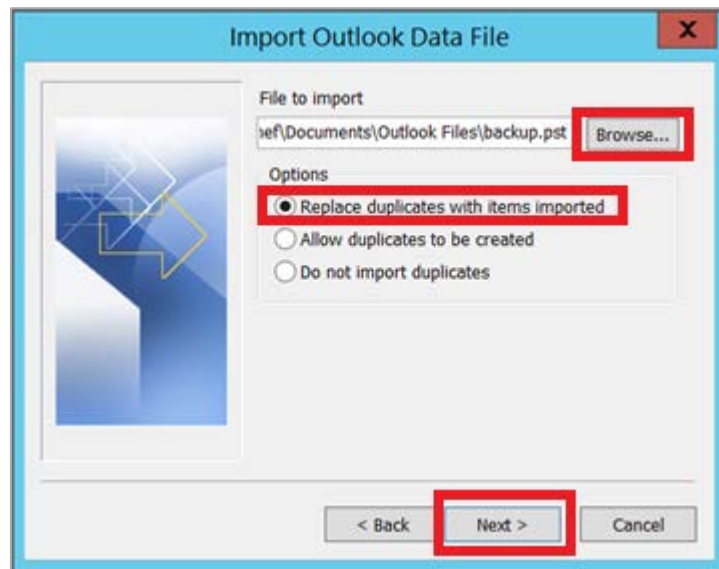
- In the Import and Export Wizard, click **Import from another program or file**, and then click **Next**.



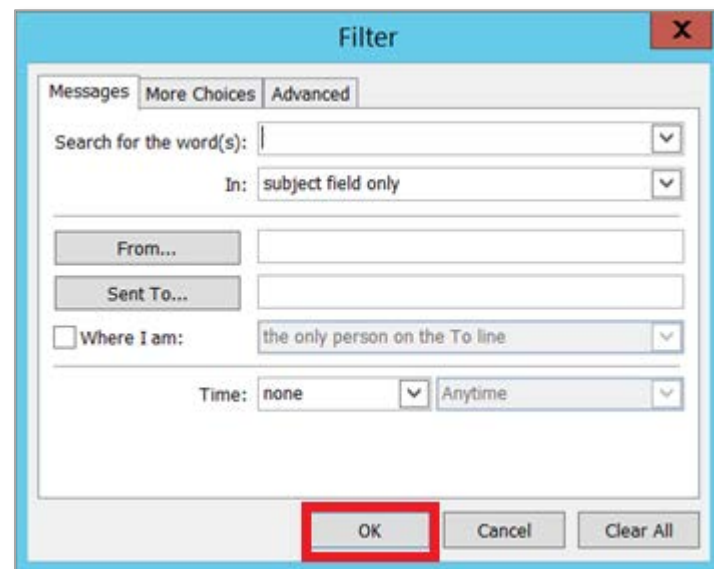
- Select **Outlook Data File (.pst)**, and then click **Next**.



- Choose **Browse**, then **choose the .pst file you want to import**, and choose **Next**.
- Under **Options**, use the radio buttons to indicate whether to replace duplicate items already in Outlook with newly imported items.



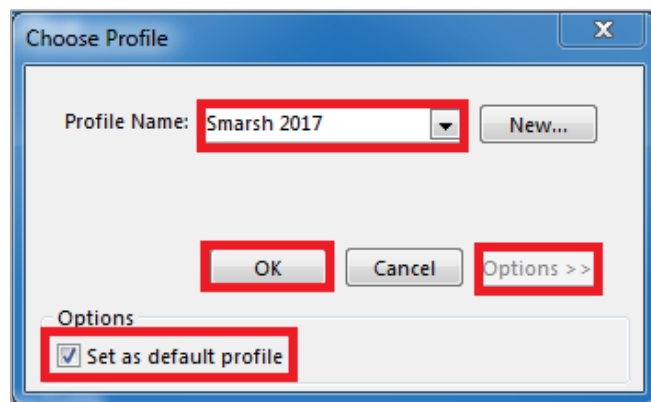
- If a password was assigned to the Outlook Data File (.pst), you are prompted to enter the password, and then click OK.
- Set the options for importing items. Choose **Filter** if you want to only import certain emails. Choose the **More Choices** tab if you want to only import emails that are read or unread.



- The default settings usually don't need to be changed. The top folder — usually Personal Folders, Outlook Data File, or your email address — is selected automatically.
- **Include subfolders** is selected by default. All folders under the folder selected will be imported.
- **Select one of the destination options:**
 - **Import items into the current folder:** This imports the data into the folder currently selected.
 - *(Recommended)* **Import items into the same folder:** This imports the data into the destination folder of the same name as the source folder, e.g., from Inbox to Inbox. If a folder doesn't exist in Outlook, it will be created.
- Choose **Finish**. Outlook will start importing your data immediately. You'll know it's finished when the progress box closes.
- **Verify the contents of your new mailbox profile.** You should now be connected to your new Exchange 2016 services with all your historical data intact and at your fingertips.
- Once verified, **Exit Outlook**.

Set Your New Outlook Profile as Default

- **Start Outlook;** the Choose Profile window will appear. Select your **new profile** from the **Profile Name** dropdown and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



POP to POP: Outlook 2007

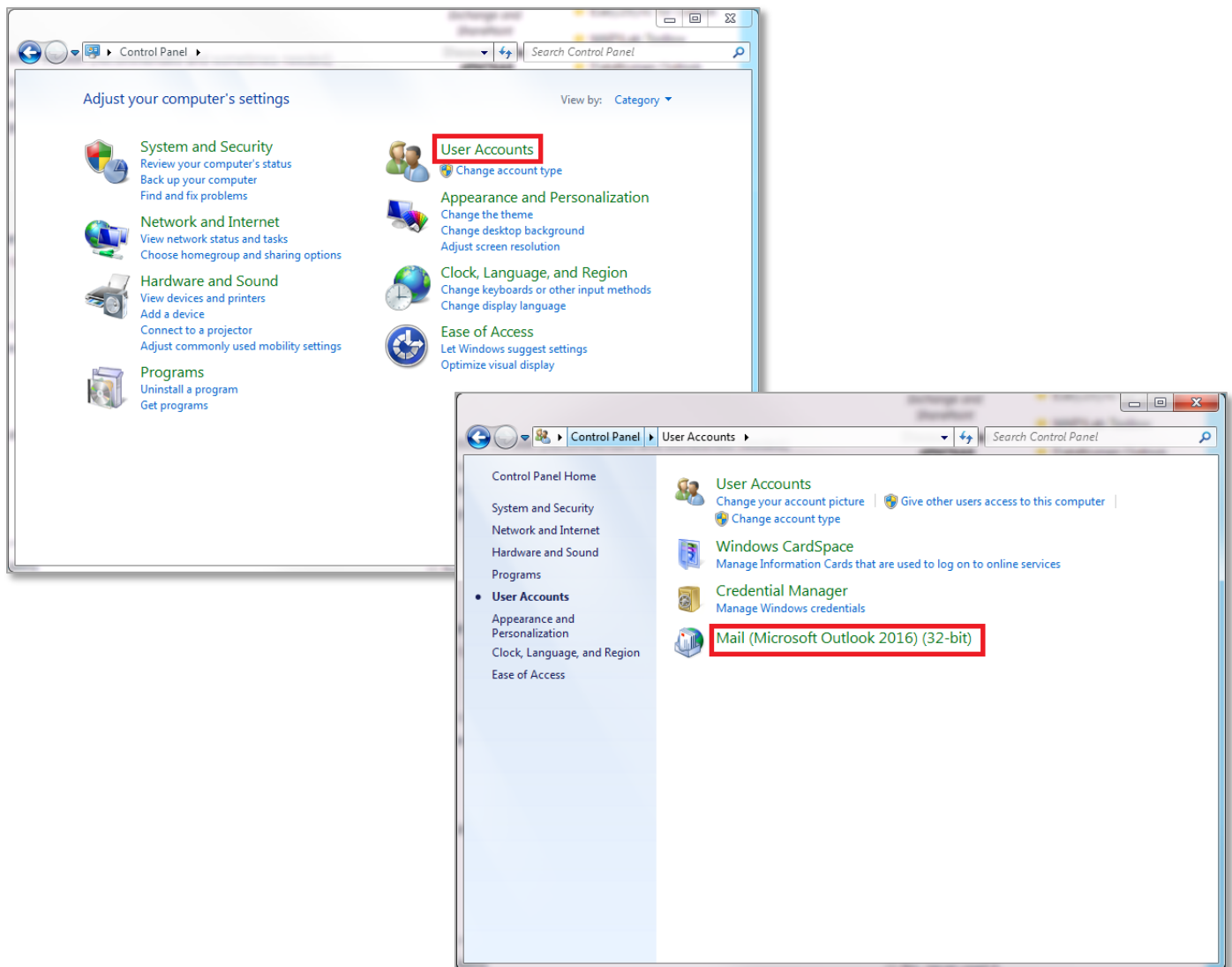
Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

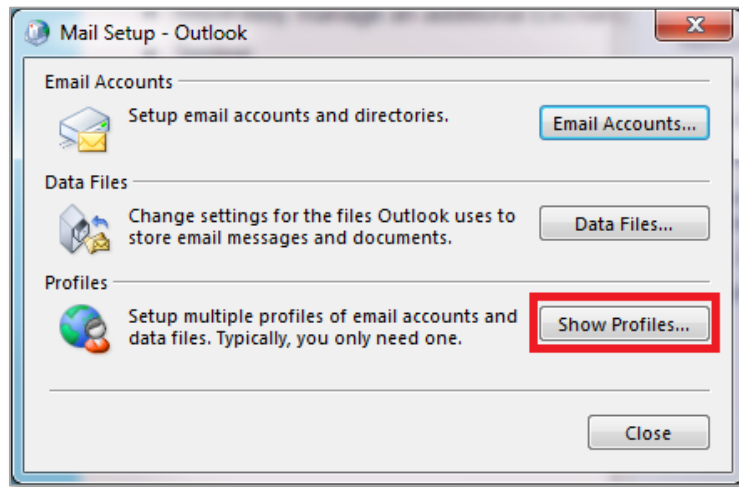
- Create a new Outlook profile
- Export data from your old Outlook profile
- Import data to the new Outlook profile
- Set your new profile as default

Provision a New Outlook Profile

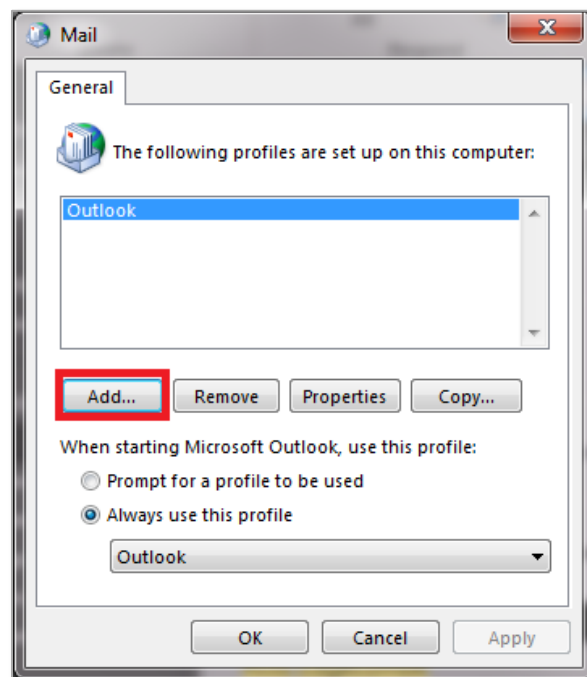
- Navigate to the Windows **Control Panel** and select **Mail**. The location of your Mail option depends on your version of Windows and on your layout settings of the control panel. If viewing the control panel by category, select User Accounts to view the Mail applet.



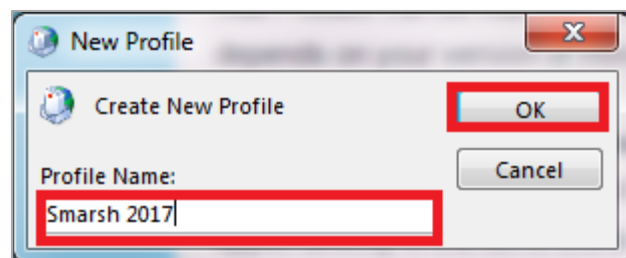
- Once the Mail Setup page appears, select **Show Profiles**.



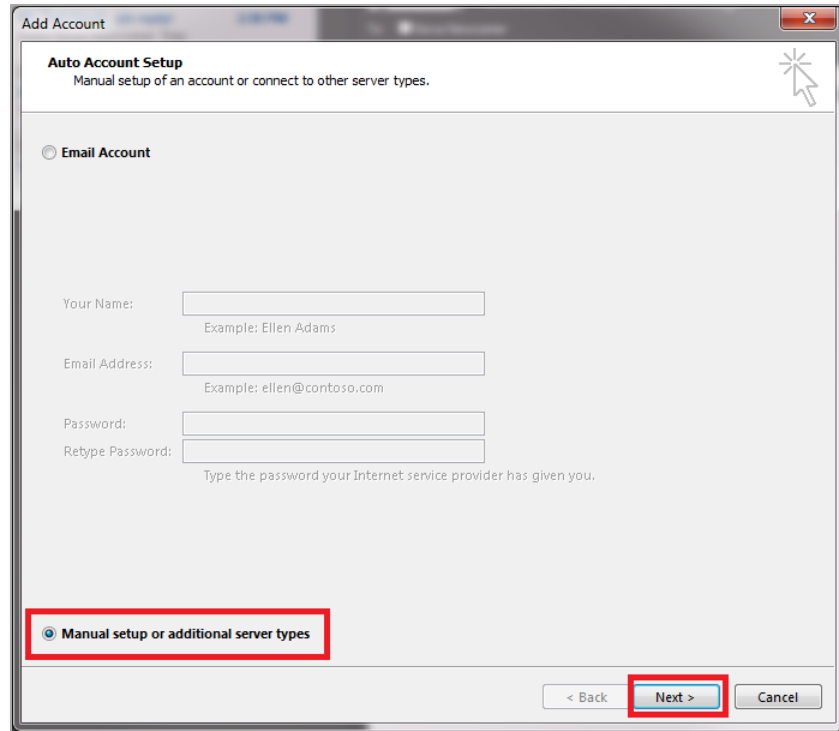
- In the Mail window, click **Add** to create a new Outlook Profile.



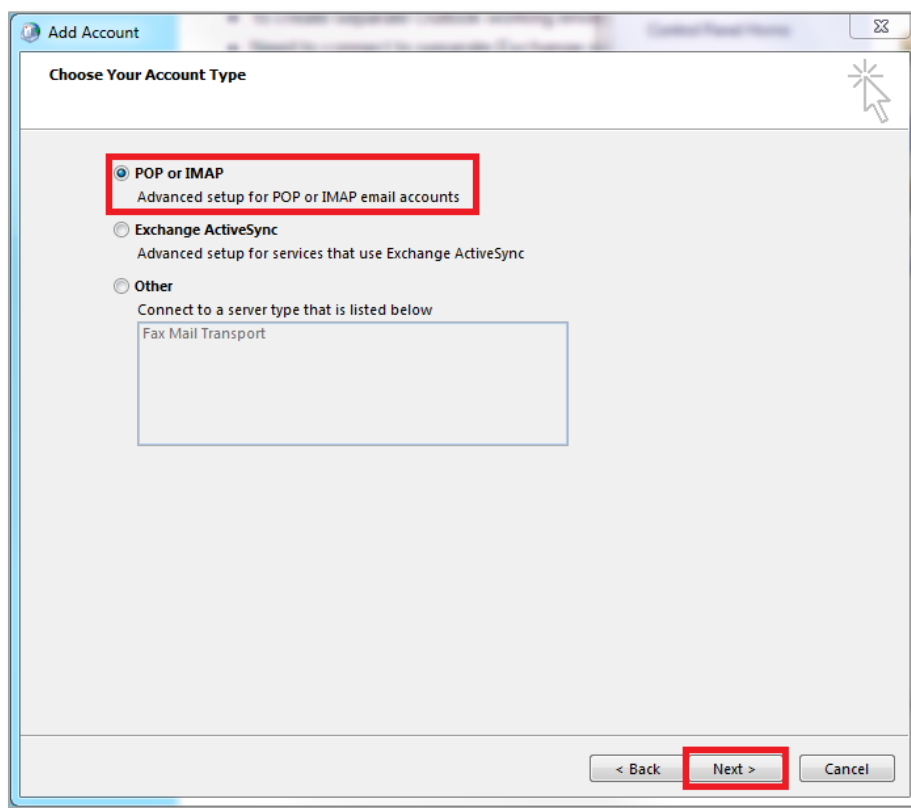
- In the New Profile window, enter the desired name for your new Outlook Profile, for example: Smarsh 2017. Click **OK** when finished.



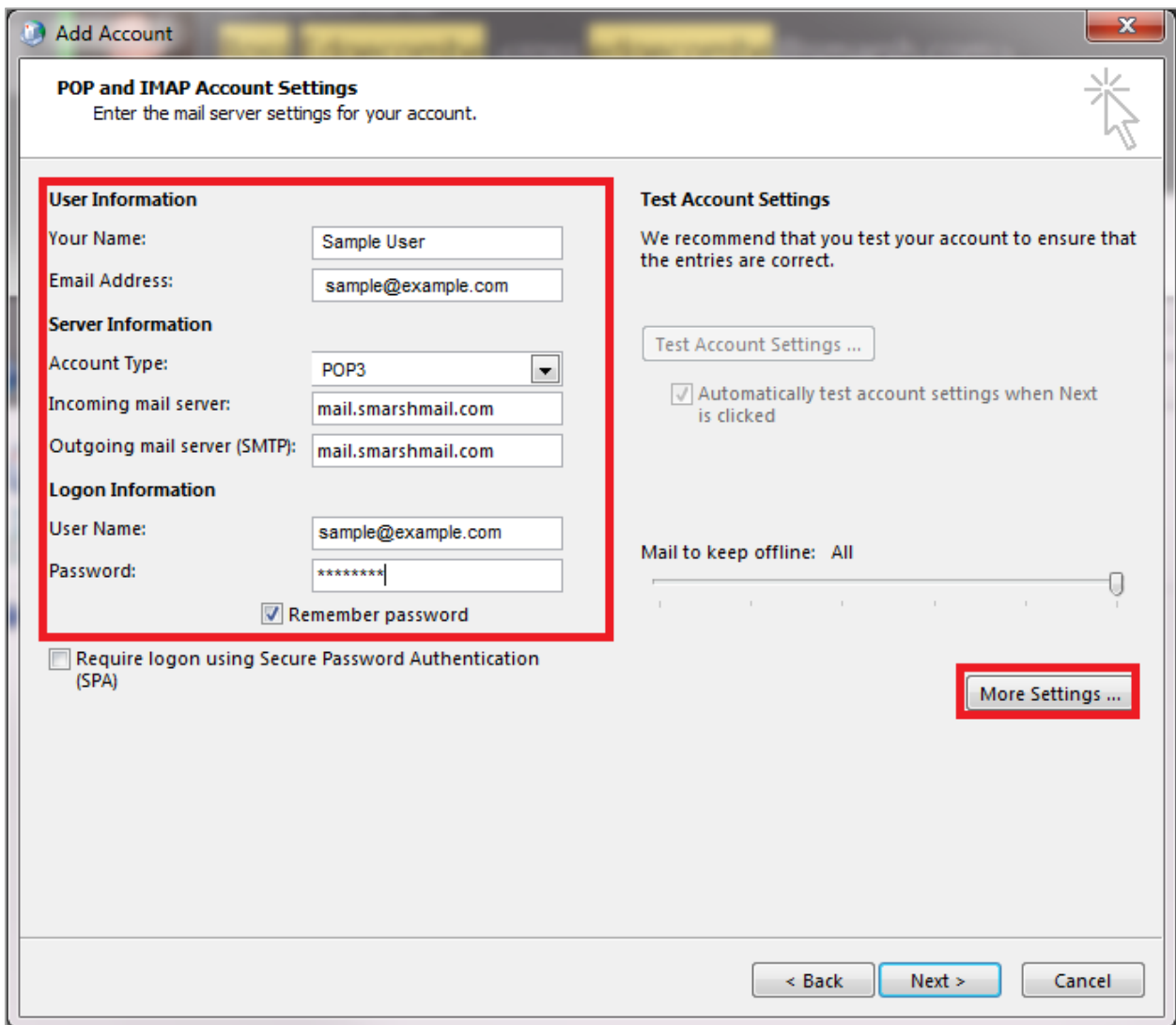
- If your computer is currently connected to another email service or to an Office 365 account, a dialog window may appear asking if you would like to connect to those services. If you see this dialog window, select **Connect to a different account** in the bottom right hand corner of that message.
- In the Add Account window, Email Account will be selected by default. Select the **Manual setup or additional server types** radio button and select **Next**.



- Select **POP or IMAP** and click **Next**.



- Please complete the following on the next screen of the dialog box:
 - Enter your **Display Name** in to the **Your Name** field (this is the name you would like others to see when they receive emails from you).
 - Enter your **newly upgraded email address** in to the **Email Address** field (your email address should be unchanged).
 - Set the **Account Type** to **POP3**.
 - Enter both your incoming and outgoing server details as: **mail.smarshmail.com**
 - Confirm your **email address is entered as your User Name** in the Logon Information Section.
 - Enter the password to your newly upgraded email account in the **Password** field (your password should be unchanged).
- Once the above details have been selected and entered, click **More Settings**.



The screenshot shows a Windows-style dialog box titled "Add Account" with a close button (X) in the top right corner. The main heading is "POP and IMAP Account Settings" with a subtitle "Enter the mail server settings for your account." and a help icon (question mark) in the top right. The dialog is divided into two main sections: "User Information" and "Test Account Settings".

User Information (highlighted with a red box):

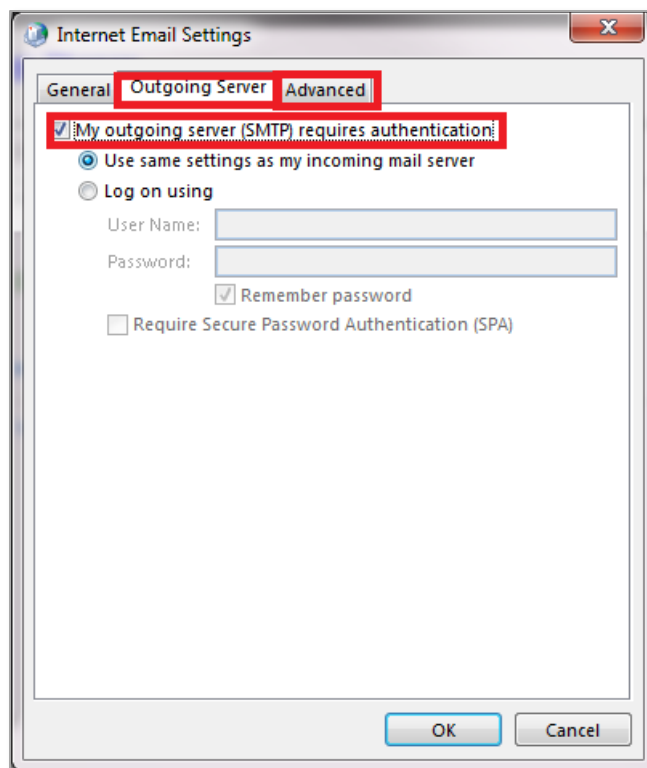
- Your Name:** Text field containing "Sample User".
- Email Address:** Text field containing "sample@example.com".
- Server Information:**
 - Account Type:** Dropdown menu set to "POP3".
 - Incoming mail server:** Text field containing "mail.smarshmail.com".
 - Outgoing mail server (SMTP):** Text field containing "mail.smarshmail.com".
- Logon Information:**
 - User Name:** Text field containing "sample@example.com".
 - Password:** Text field containing "*****".
 - ☒ Remember password
- ☐ Require logon using Secure Password Authentication (SPA)

Test Account Settings:

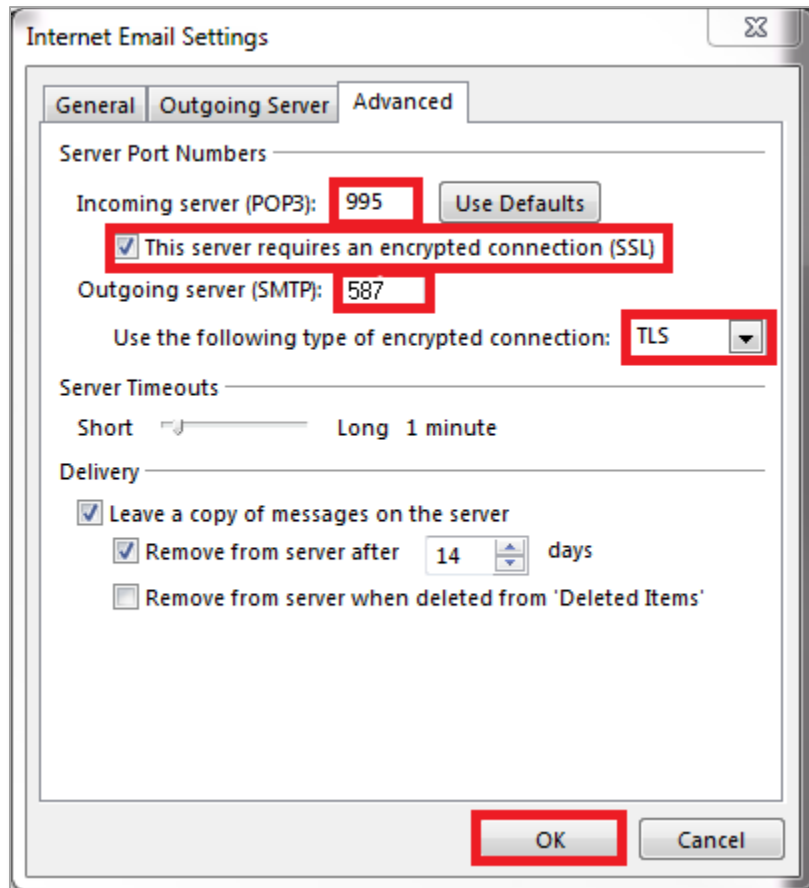
- Text: "We recommend that you test your account to ensure that the entries are correct."
- Button: "Test Account Settings ..."
- ☒ Automatically test account settings when Next is clicked
- Mail to keep offline:** Slider set to "All".
- Button: "More Settings ..." (highlighted with a red box).

At the bottom of the dialog are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".

- In the Internet Email Settings window, select the **Outgoing Server** tab and select the **My outgoing server (SMTP) requires authentication** check box. The **Use same settings as my incoming mail server** radio button will be selected by default. Continue to the **Advanced** tab in the Internet Email Settings window.



- In the Internet Email Settings window under **Advanced** tab, complete the following changes:
 - In the Incoming server (POP3) field, enter **995**.
 - Check the box for **This server requires an encrypted connection (SSL)**.
 - In the Outgoing server (SMTP) field, enter **587**.
 - In the Use the following type of encrypted connection field, select **TLS**.



Internet Email Settings

General | **Outgoing Server** | Advanced

Server Port Numbers

Incoming server (POP3): **995** Use Defaults

☒ **This server requires an encrypted connection (SSL)**

Outgoing server (SMTP): **587**

Use the following type of encrypted connection: **TLS**

Server Timeouts

Short ————— Long 1 minute

Delivery

☒ Leave a copy of messages on the server

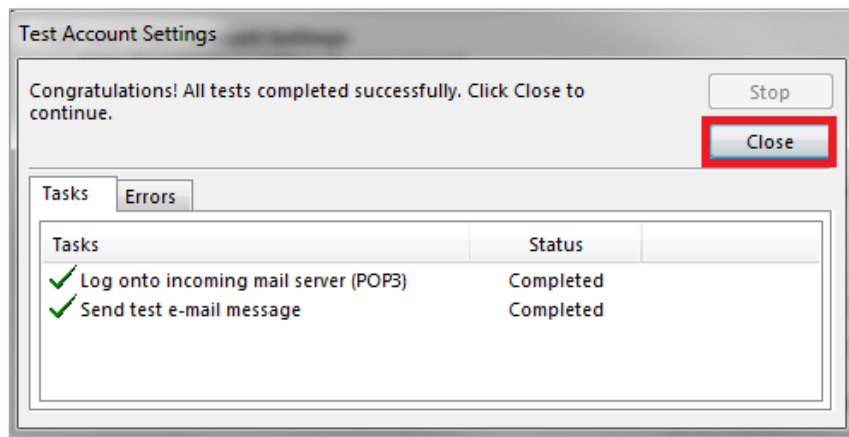
☒ Remove from server after 14 days

☐ Remove from server when deleted from 'Deleted Items'

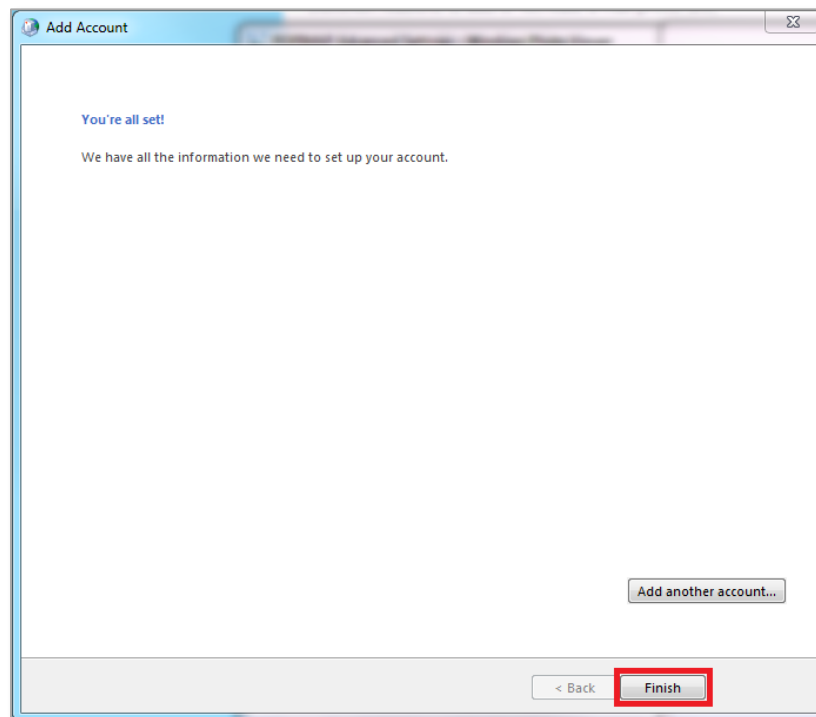
OK Cancel

- Once the above details have been selected and entered, click **OK**.

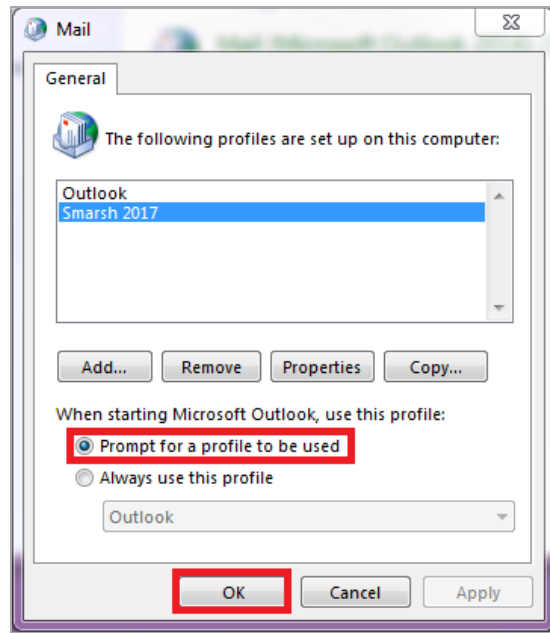
- On the Add Account window, click **Next**. Windows will now attempt to log onto the incoming mail server (POP3) and send a test email message. If this is successful, the Test Account Settings dialog box will show a **Completed** status for both tasks. If both tasks complete correctly, select **Close**.



- If the tasks do not complete successfully, consider returning to the previous screen to confirm your settings in the Internet Email Settings window.
- Once your new profile has been created, the Add Account window will indicate that you're all set. Click **Finish**.



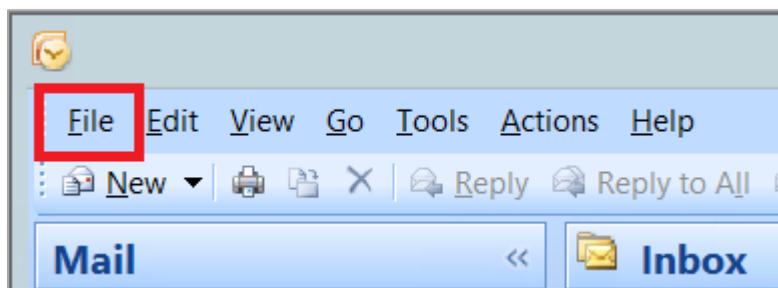
- After you have clicked **Finish**, you will be directed back to the Mail window where your additional profile will be listed. To utilize your new profile in Outlook immediately, while still maintaining quick access to your old configuration, ensure **Prompt for a profile to be used** is selected and click **OK**.



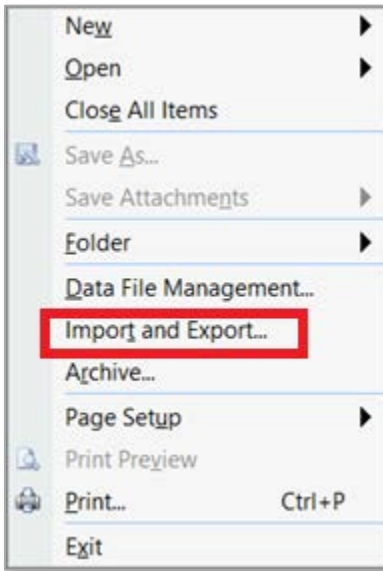
- Once all email data has been verified to be intact in your new profile, either select **Options** and **Set as Default** when starting Outlook or return to the Mail window and select **Always use this profile** with your new profile ex: **Smarsh 2017** selected.

Export POP Data to .pst

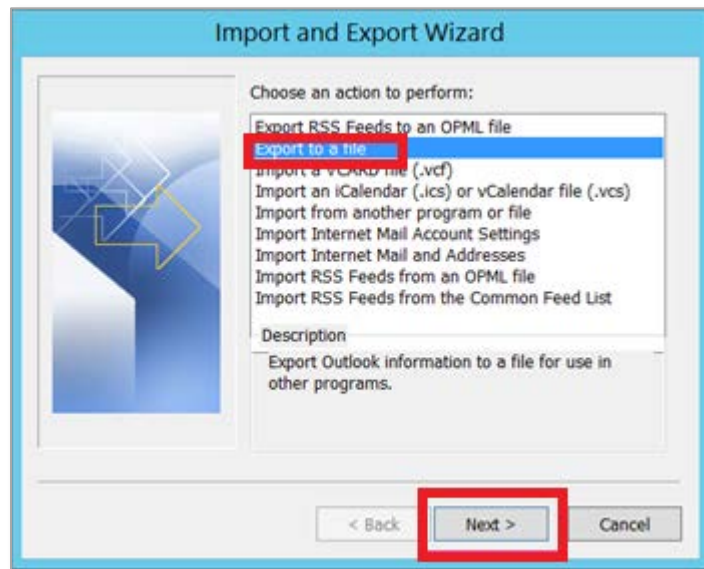
- In Outlook 2007, choose **File** at the top of your ribbon.



- Choose **Import and Export**.

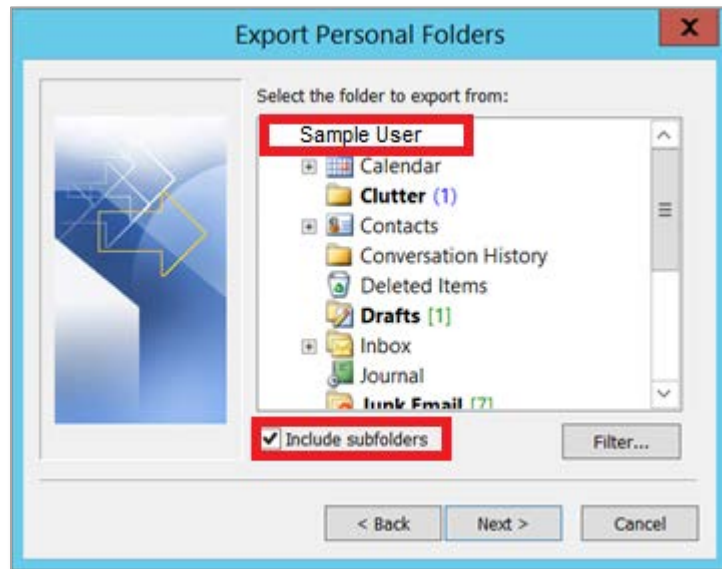


- Select **Export to a file**, and then click **Next**.

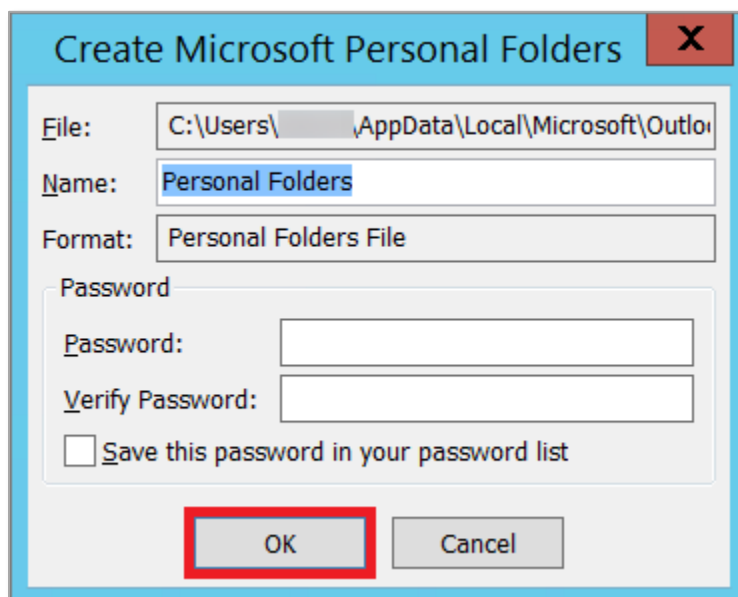


- Click **Personal File Folder (.pst)**, and then click **Next**.
- Select the name of the email account to export, as shown in the picture below.

- Make sure that the **Include subfolders check box is selected**. This way everything in the account will be exported: Calendar, Contacts, and Inbox. Click **Next**.



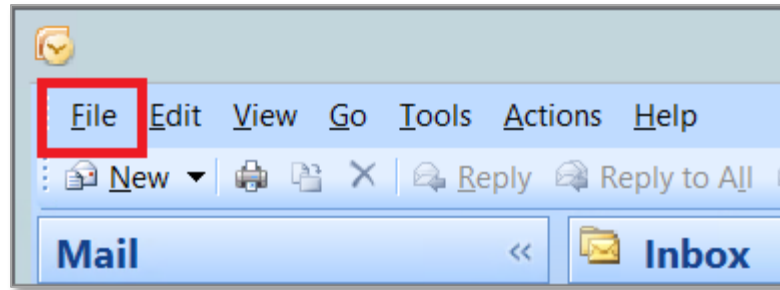
- Click **Browse** to select where you want to save the Outlook Data File (.pst) and to **enter a file name**. Click **OK** to continue.
- Click **Finish**.
- You have the option to select a password for the .pst file. If you would like to set a password for the file, enter it in the **Password** and **Verify Password** fields. If you do not wish to set a password for the file, leave the password fields blank. Click **OK**.



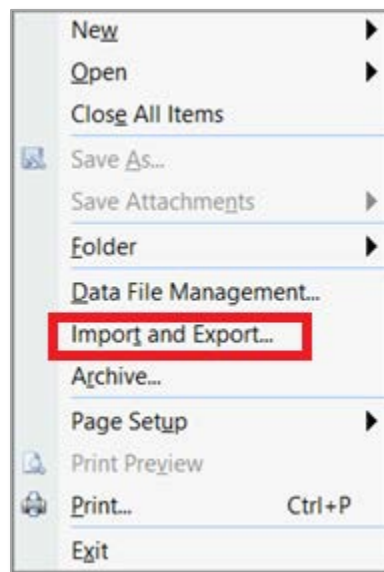
- Your export begins immediately and you can now **Exit Outlook**.

Import POP Data from .pst

- At the top of our Outlook 2007 ribbon, choose **File**.



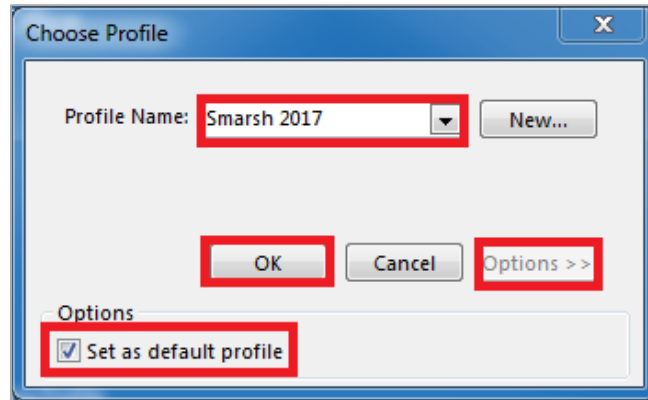
- Choose **Import and Export**. This starts the Import and Export Wizard.



- In the Import and Export Wizard, click **Import from another program or file**, and then click **Next**.
- Click **Personal Folders File (.pst)**, and then click **Next**.
- Click **Browse**, and then **choose the file to import**.
 - Under Options, it is recommended that you click **Do not import duplicates** unless you want the imported information to replace or duplicate items already in Outlook, if any.
- Click **Next**.
- If a password was assigned to the Personal Folders file (.pst), you will be prompted to **enter the password**, and then click **OK**.
- Set the options for importing items.** The default settings usually don't need to be changed.
 - The top folder** — usually Personal Folders or your email address — is selected automatically.
 - Include subfolders** is selected by default. All folders under the folder selected will be imported.
- Select one of the destination options:**
 - Import items into the current folder - this imports the data into the folder currently selected.
 - (Recommended)* **Import items into the same folder** - this imports the data into the destination folder of the same name as the source folder, e.g., from Inbox to Inbox. If a folder doesn't exist in Outlook, it will be created.
- Click **Finish**.

Set Your New Outlook Profile as Default

- **Start Outlook**; the Choose Profile window will appear. Select your **new profile** from the **Profile Name** dropdown and click **Options**. Check the **Set as default profile** option and click **OK**. Going forward, Outlook will utilize your new profile by default.



Apple Mac OS X 10.6+

POP to POP: Outlook for Mac 2016

Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

- **Export your existing mail** from Outlook.
- **Import your existing mail** back into Outlook so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Outlook).
- **Remove your old mail account** from Outlook.
- **Add your new email account** to Outlook.

Export Existing Mail

- Launch **Outlook**.
- Click **File** and select **Export**.
- Select **All Item Types**.
- Click **Continue**.
- **Save the File** in an easy to find location. **Continue**.
- Once the Export is complete click **Finish**.

Import Existing Mail

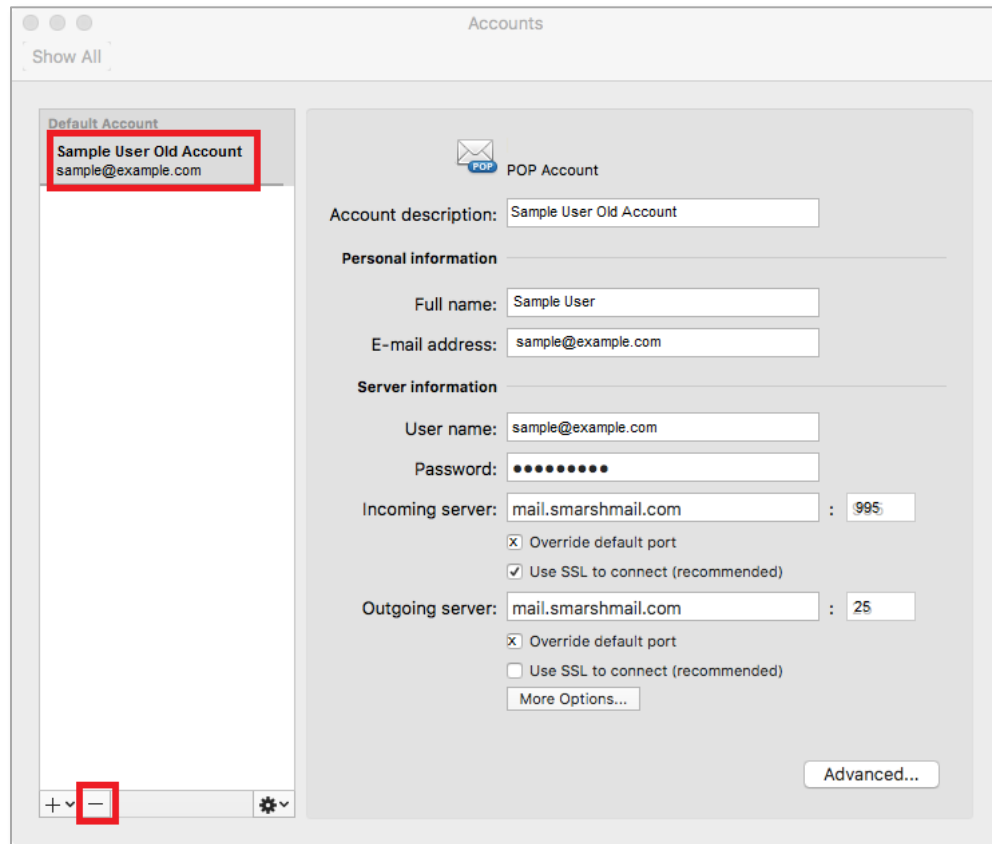
- In Outlook, click **File**, then select **Import**
- Select **Outlook for Mac Archive file (.olm)** and click **Continue**.
- **Browse** to where you saved **your Outlook For Mac Archive File (.olm)** in the previous step. Click **Import**.
- The import will start immediately. Click **Finish** once complete.

Remove your Old Mail Account

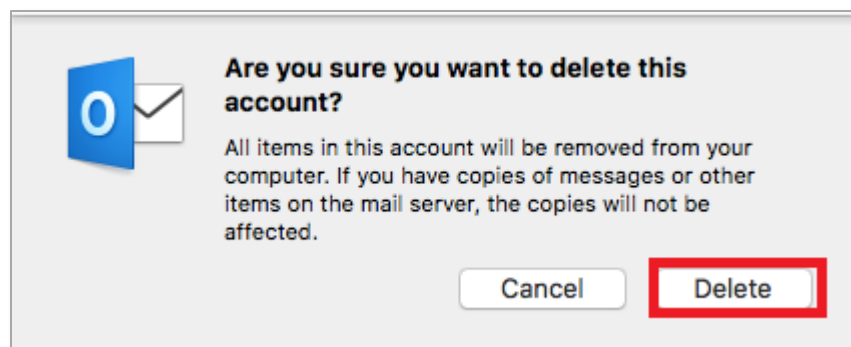
CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

- In Outlook, click **Tools > Accounts**.

- Select the **Account** and click the **minus symbol** (–) in the bottom left hand corner of the Accounts window.

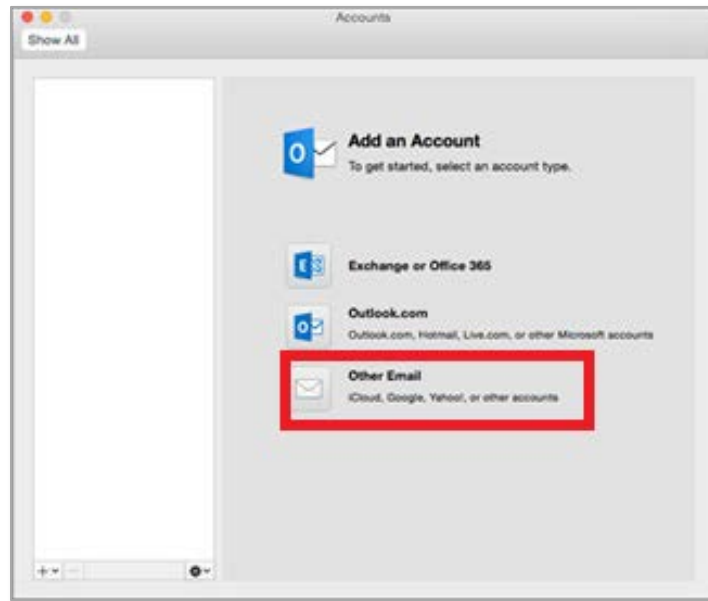


- Outlook will warn of a data loss. **ONLY if you have verified you have imported your mail per the previous instructions** should you click **Delete** and continue forward.



Add your new Email Account

- In the **Accounts** box, click **Other Email**.



- Enter your **email address** and **password**.
- Enter the **mail server options as identified below** and click **Add Account**.

Enter your account information.

E-mail address:

Password:

☐ Configure automatically

User name:

Type:

Incoming server: :

☒ Override default port

☒ Use SSL to connect (recommended)

Outgoing server: :

☒ Override default port

☒ Use SSL to connect (recommended)

- Outlook will log in to your account and begin to download mail objects.
- **Select your new account** and click on the **settings button** and select **Set as Default**.
- **Close the Accounts** window.

POP to POP: Outlook for Mac 2011

Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

- **Export your existing mail** from Outlook.
- **Import your existing mail** back into Outlook so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Outlook).
- **Remove your old mail account** from Outlook.
- **Add your new email account** to Outlook.

Export Existing Mail

- Launch **Outlook**.
- Click **File** and select **Export**.
- Select **Outlook for Mac Data File (.ol,)** and **Items of the Following Types: Check All Types Desired**.
- Click **the right arrow** to Continue.
- Select **No, do not delete items**.
- Click **the right arrow** to Continue.
- **Name and Save the File** in an easy to find location. **Save**.
- Once the Export has completed click **Done**.

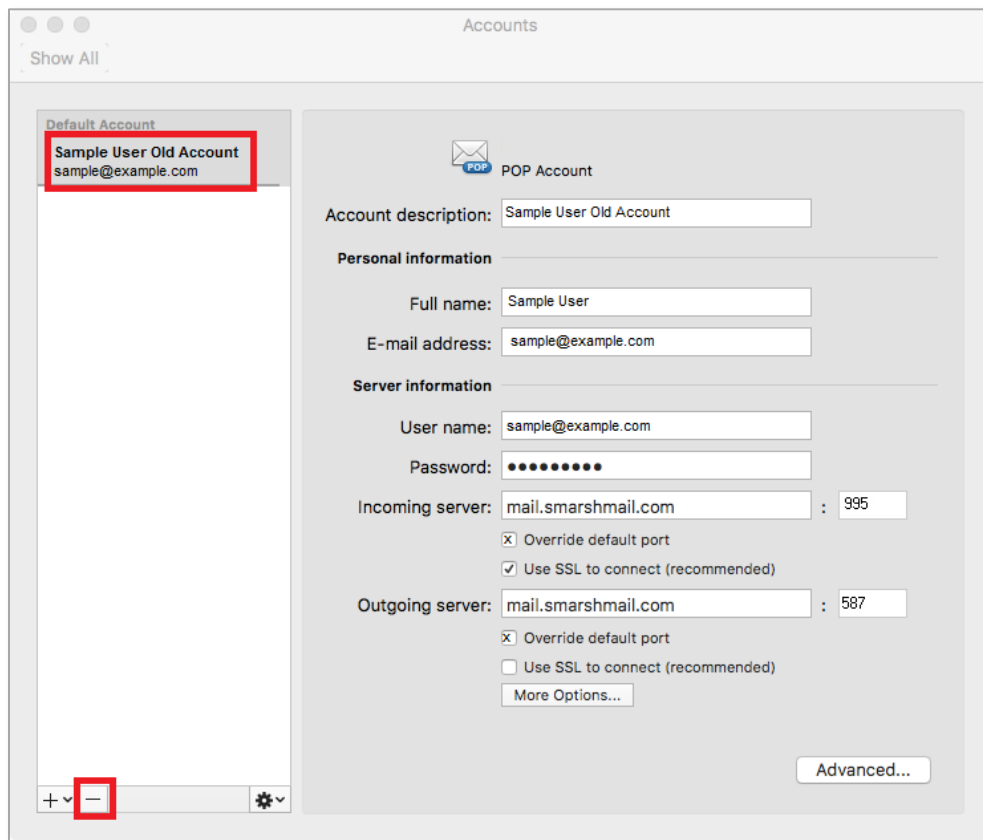
Import Existing Mail

- In Outlook, click **File**, then select **Import**.
- Select **Outlook Data File (.pst or .olm)** and click **the right arrow** to continue.
- Select **Outlook for Mac Data File (.olm)** and click **the right arrow** to continue.
- **Browse** to where you saved **your Outlook For Mac Archive File (.olm)** in the previous step. Click **Import**.
- The import will start immediately. Click **Done** once complete.

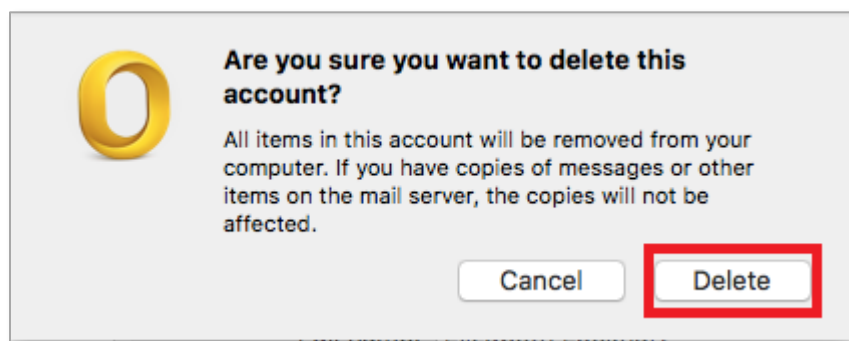
Remove your Old Mail Account

CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

- In Outlook, click **Tools > Accounts**.
- Select the **Account** and click the **minus symbol (-)** in the bottom left hand corner of the accounts screen.

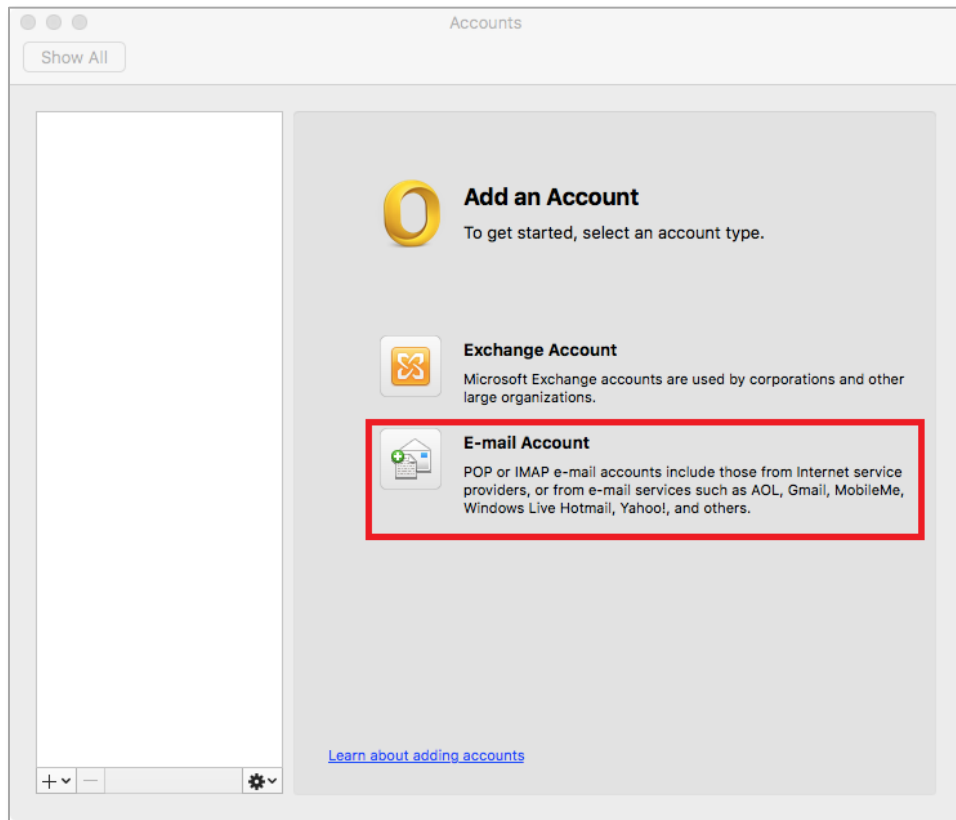


- Outlook will warn of a data loss. **ONLY if you have verified you have imported your mail per the previous instructions** should you click **Delete** and continue forward.

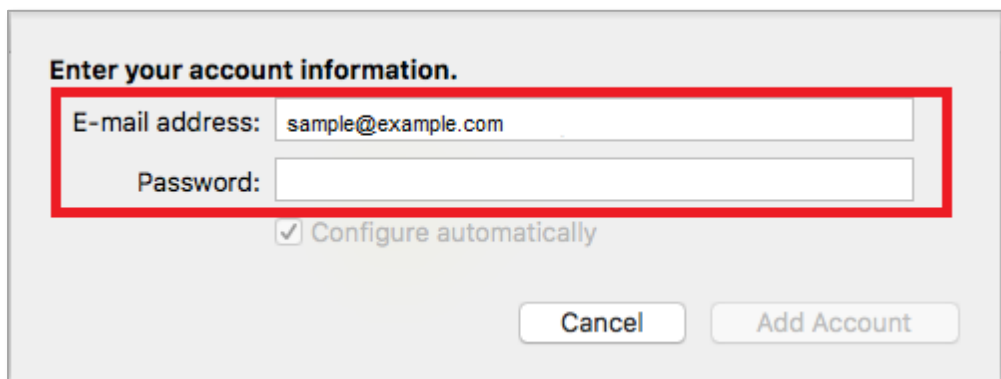


Add your new Email Account

- In the **Accounts** box, click **Email Account**



- Enter your **email address and password tab into the password field**; the window will expand to allow for full server settings to be inserted.



- Enter the following server details and click **Add Account**:

Enter your account information.

E-mail address:

Password:

☐ Configure automatically

User name:

Type:

Incoming server: :

☒ Override default port

☒ Use SSL to connect (recommended)

Outgoing server: :

☒ Override default port

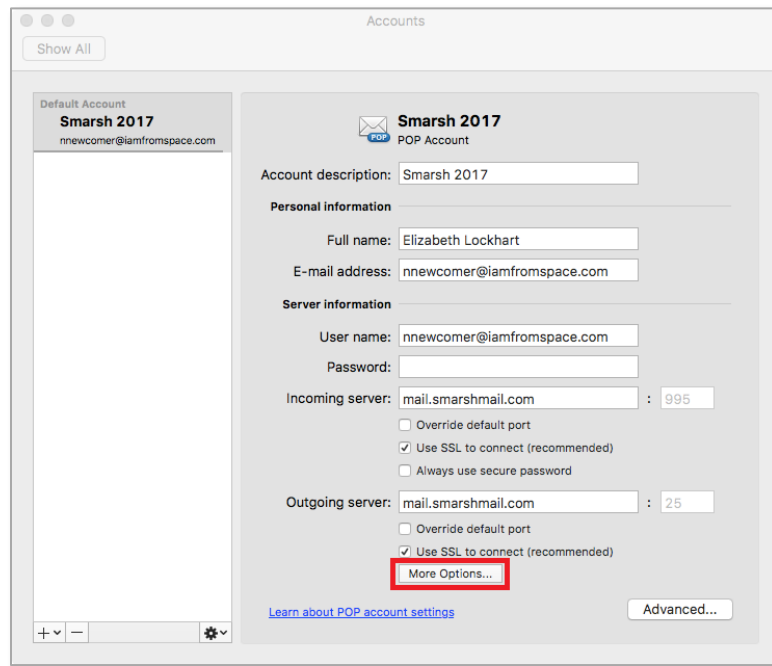
☒ Use SSL to connect (recommended)

Cancel

Add Account

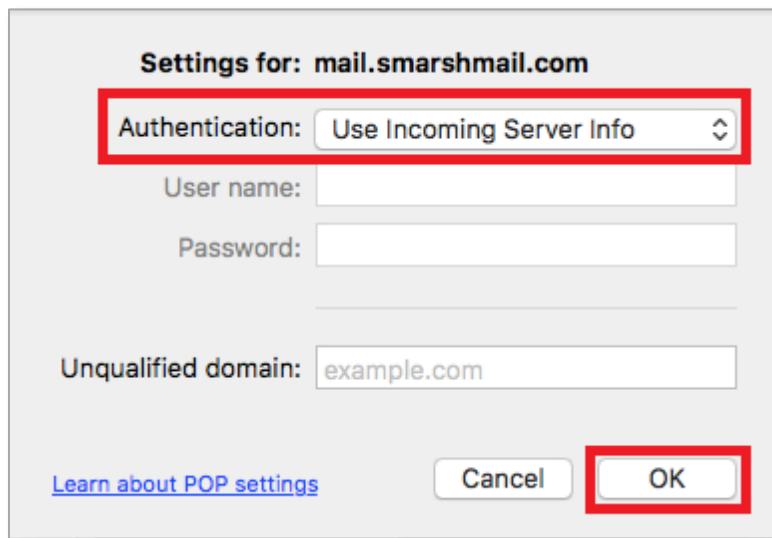
- In the main Accounts window, highlight your new account as added to Outlook. You can change the account description if you like (ex. Smarsh 2017).

- Click **More Options**.



The screenshot shows the 'Accounts' window in Outlook. On the left, a list of accounts includes 'Smarsh 2017' with email 'nnewcomer@iamfromspace.com'. The main pane shows the configuration for this account. Under 'Server information', the 'Incoming server' is 'mail.smarshmail.com' on port 995. There are checkboxes for 'Override default port', 'Use SSL to connect (recommended)' (which is checked), and 'Always use secure password'. Below these, the 'Outgoing server' is 'mail.smarshmail.com' on port 25, with similar checkboxes. The 'More Options...' button is highlighted with a red box. At the bottom, there are links for 'Learn about POP account settings' and an 'Advanced...' button.

- Select **Use Incoming Server Info** for mail.smarshmail.com authentication. Click **OK**.



The screenshot shows the 'Settings for: mail.smarshmail.com' dialog box. The 'Authentication' dropdown menu is set to 'Use Incoming Server Info' and is highlighted with a red box. Below it are fields for 'User name:' and 'Password:'. Further down is the 'Unqualified domain:' field with 'example.com' entered. At the bottom, there is a link 'Learn about POP settings', a 'Cancel' button, and an 'OK' button which is also highlighted with a red box.

- Your mail account will now be taken online and your mail will begin to download from the server. You may now **close the Accounts window** and send/receive mail.
- The first time you send a message, **Outlook may prompt for your email password**. Enter your **email password** and check the box to have your computer **remember your password** going forward.

POP to POP: Apple Mail

Note: This is not the recommended configuration for your Smarsh Hosted Services Email Account. For basic POP/IMAP email services, IMAP is the recommended configuration for your connection to Exchange 2016.

These instructions will guide you to:

- **Export your existing mail** from Apple Mail.
- **Import your existing mail** back into Apple Mail so that it references a folder on your computer rather than the previous Outlook folder (this will ensure your mail is still accessible, but will not be deleted when your existing mail account is removed from Apple Mail).
- **Remove your old mail account** from Apple Mail.
- **Add your new email account** to Apple Mail.

Export Existing Mail from Apple Mail

- Launch **Mail**.
- **Select your old Smarsh Hosted Email Mailbox**, then choose **Mailbox > Export Mailbox**.
- **Choose a folder or create a new folder**, then click **Choose**.
- Your mail file export will begin immediately. Wait for the file to appear as “INBOX.mbox” wherever you saved your export.
- **Exit Mail**.

Import Existing Mail Back into Apple Mail

Any mail that was not stored on the server will need to be imported from the export file created previously. To import your mail items:

- With Mail open, **select your newly added Smarsh Hosted Email Account**.
- Click **File > Import Mailboxes**
- Select **Apple Mail** and click **Continue**.
- **Locate your Exported Mailbox File** and click **Choose**.
- Your mail will import directly to Apple Mail. Click **Done**.

Imported mail will show up under the “Import” folder in the “On My Mac” section of Apple Mail. Utilize your new email account inbox for sending and receiving new messages.

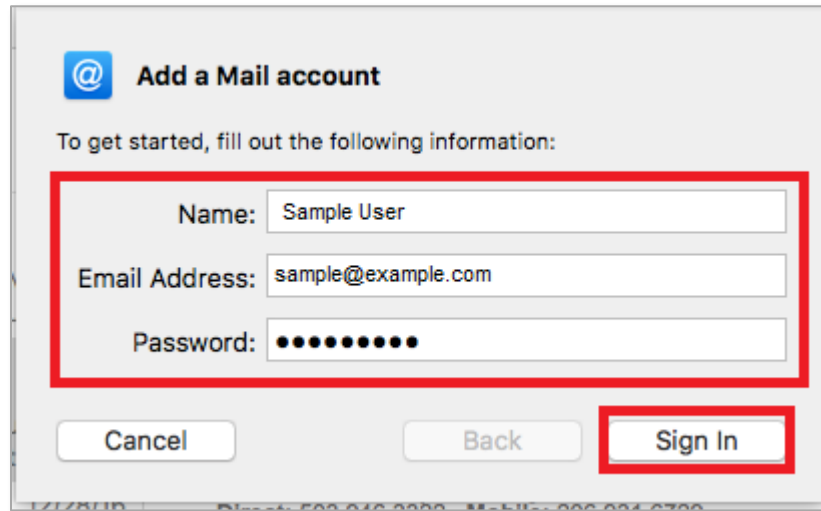
Remove Old Mail Account

CAUTION: Do not complete this portion of the instructions prior to [exporting and/or importing your old mail](#). Failure to export old mail prior to removing your old account may cause data loss if messages are only stored locally on your computer and do not exist on the server anymore.

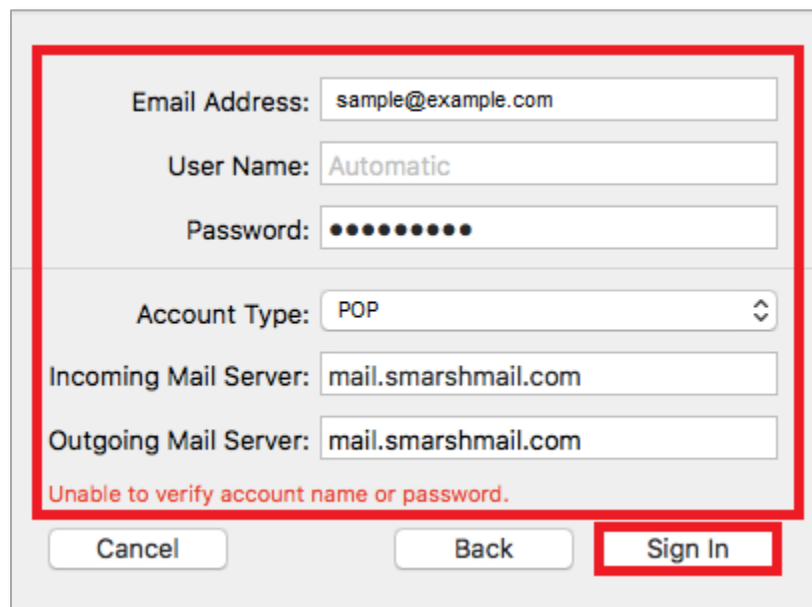
- Launch **Mail**.
- Click **Mail > Accounts**.
- Select your **Old Smarsh Email Account** and click the – **or remove** button.
- Select **OK**.
- **Close the Internet Accounts** window.

Add New Mail Account

- With Mail open, click **Mail > Add Account**.
- From the list of account types select **Add Other Mail Account** and click **continue**.
- Enter your **Full Name**, **Email Address** and **Password**. When finished, click the **Create** or **Sign In** button.



- You will receive a message that the account is unable to verify your name or password. **Enter the following server details** and click **sign in**:



- Your mail account will now be taken online and your mail will begin to download from the server.