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1 FolderMatic Clone-A-Folder for Exchange Server User Guide



FolderMatic Clone-A-Folder for Exchange Server

Available for download at www.DidItBetter.com

Version 1.0

10/15/2007

- **Quick Start Guide: Solution Scenarios**
- **Product Information**
- **User Manual**
- **Troubleshooting Tips**

This manual updated online at www.DidItBetter.com

IMPORTANT! Please read the Release Notes included with the version of FolderMatic Clone-A-Folder for Microsoft Exchange you are installing. The Release Notes summarize important updates on the installation process, system requirements and procedures that are especially significant, regardless of whether you are new to FolderMatic Clone-A-Folder for Microsoft Exchange or an experienced user.

Save time! Want to skip reading this manual? We are now offering Remote Installation and Configuration Services for this software.

Visit our online store for pricing and to purchase your Remote Installation Service today!

2 Legal Information

Microsoft®, Windows®, Windows XP®, Windows Server®, Exchange®, Exchange Server®, Outlook®, Outlook Web Access®, SQL Server®, SQL Server Express®, Microsoft Update®, PowerShell® and Remote Desktop Connection® are the registered property of their respective owners.

DidItBetter Software®, Add2Exchange®, Add2Outlook®, FolderMatic Clone-a-Folder for Microsoft Exchange® are the registered property of DidItBetter Software.

3 **A Note from your DidItBetter Software Technical Support Team**

Let's start by building a good relationship between you and our support team. It is a good idea to read this document in its entirety because, as with any powerful tool, it is best to be familiar with the ALL of the practical aspects of FolderMatic Clone-A-Folder for Microsoft Exchange operation before using it on your mission-critical data.

Please do not install the solution before reading this manual, as there are some prerequisites you HAVE to do before you have a successful trial. As always, back up your data FIRST, before installation and operation.

This manual and software is the product of thousands of past man hours of programming, testing, requests and feedback from people like YOU. Please share your suggestions on making our products serve you best. Email your suggestions to Ai@diditbetter.com.

Again, continue reading this document fully so you understand the necessary configuration for proper operation. It is NOT a trivial application. You need to install it as a specific user with specific permissions, and no, your Administrator or Domain Admin does not have the proper permissions. If you have a problem, we have a complete section of Technical Bulletins and Frequently Asked Questions on the web at www.DidItBetter.com. We know that traditionally these resources are more fluff than buff, but our Technical Bulletins section can help you find every issue the support team has encountered, complete with recommendations and resolutions, 24 hours a day. Please use these resources. We guarantee they will be helpful for you and will not only help us serve you better and faster but can even eliminate many common issues before they even happen.

Thanks for helping us build a great support relationship.

The DidItBetter Software Team

4 Your 7 Rights as a DidItBetter Software Licensee

1. You have the right to a better user experience by reading this manual. Informed customers make their own experiences better. "RTFM".
2. You can get FREE email technical assistance within your Software Maintenance plan. You can use the Technical Support Knowledge base absolutely FREE. Here are the links:
 - FAQs: <http://www.DidItBetter.com/FAQ.aspx>
 - Technical Bulletins and Supporting Files: http://www.DidItBetter.com/Add2Exchange_Bulletins.aspx
 - Documentation: <http://www.DidItBetter.com/Documentation.aspx>
 - To submit a support request: <http://www.DidItBetter.com/SupportRequest.aspx>
3. You have the right to contact and receive support Monday through Friday from 9 a.m. to 5 p.m. EST. Rates for phone, Remote Support and Priority Support can be found at our online store by clicking Support Options under the Categories bar.
4. You have the right to have your configuration certified, the package installed, upgraded and/or configured for you for a reasonable fee by one of our certified technicians. Most people who select this option are glad they did and often comment that it was the best money ever spent for support.
5. You can escalate your issue to have Remote Installation by one of our certified Techs or purchase Incident Support. After purchase, licensed end-users have FREE email support for 6 months and can purchase extended Software Maintenance. We also offer Priority Support on a fee basis, which includes immediate phone and/or remote assistance. Call, or visit our online store and click Support Options under the Categories bar.
6. You have the right to have your ideas and suggestions for increased functionality heard, acknowledged and considered for future upgrades.
7. You have the right to have your upgrade request escalated to a custom request and formally quoted.

Thank you for the opportunity to be of service.

5 System Requirements

All installations require **Microsoft .NET Framework 2.0**. It is highly recommended that you perform all current Microsoft Updates to your server, including any necessary reboots, before installing FolderMatic. FolderMatic is usually installed on the Exchange, Add2Exchange or Blackberry server.

Configurations which do not meet the minimum requirements outlined here are not supported under the terms of the standard free Software Maintenance agreement.

Hardware Requirements

Feature	Minimum Configuration	Recommended Configuration
Free Disk Space	<ul style="list-style-type: none"> • 100 MB 	<ul style="list-style-type: none"> • 1 GB
RAM	<ul style="list-style-type: none"> • Exchange 2003 Server - 1 GB • Exchange 2007 Server* - 2 GB • Workstation - 512 MB 	<ul style="list-style-type: none"> • Exchange 2003 Server - 2 GB • Exchange 2007 Server* - 4 GB • Workstation - 1 GB

* Exchange 2007 has been tested and is supported. When needed, the manual will direct you to the Exchange 2007 appendix at the end of this manual. Exchange 5.5 is no longer supported.

Operating System Requirements

Operating System	Windows Server 2003	Windows Small Business Server	Windows 2000	Windows XP
Editions	<ul style="list-style-type: none"> • Standard • Enterprise • DataCenter 	<ul style="list-style-type: none"> • Standard • Premium 	<ul style="list-style-type: none"> • Server • Professional • Advanced • DataCenter 	<ul style="list-style-type: none"> • Home • Professional • Tablet • Media Center
Service Pack Level	<ul style="list-style-type: none"> • Minimum: SP1 • Recommended: SP2 	<ul style="list-style-type: none"> • SP1 	<ul style="list-style-type: none"> • SP4 	<ul style="list-style-type: none"> • SP2

Tip: You can verify your Service Pack level by right-clicking My Computer, selecting Properties and looking under the System heading.

Exchange Server Requirements

Exchange Version	Exchange 2003	Exchange 2000
Service Pack Level	<ul style="list-style-type: none"> • Minimum: SP1 • Recommended: SP2* 	<ul style="list-style-type: none"> • SP3**

* Refer to <http://support.microsoft.com/kb/906669>.

** Refer to <http://support.microsoft.com/kb/824960>.

Installation Environments

If you are installing FolderMatic on a server **other than** the Exchange server itself, then you must make sure the latest version of Collaboration Data Objects (CDO) is installed on the server. If FolderMatic is not installed directly on the Exchange Server, the version of Exchange System Manager you install **must** be at same level as Exchange Server. CDO is included by default with Exchange System Manager, which is the best way to install CDO on your system. Once done, do all Microsoft Updates on BOTH servers (if applicable) and reboot your system(s).

For Exchange System Manager system requirements, refer to <http://support.microsoft.com/kb/822178>. For Exchange 2007, please refer to the Appendix at the end of this manual.

Clustered Servers

FolderMatic is not cluster-aware and will not support clustering fail-over capability, and really does not need to since once the folders are made, the program is terminated and does not need the connection the server any longer. FolderMatic can be installed as a regular application on a clustered server, Exchange, Utility, Virtual or File Server. In such an environment, choose a physical server on which to install FolderMatic. You should configure FolderMatic with the Clustered server name as the Exchange Server if/when prompted for the Exchange Server during the installation process.

Virtual Machines

There are no reported issues with FolderMatic on Virtual Machines. The VM must be bridged to the network, on the same subnet and be able to "see" the Exchange Server with WMI, RPC and CDO. The Exchange Server must be powered on during the entire Folder Cloning process for FolderMatic to operate.

Terminal Servers

FolderMatic is not recommended on Terminal Servers as performance may suffer and Exchange System Manager must be installed. Conceivably there could be Outlook CDO conflicts with Exchange System Manager (even if Outlook is not installed, it is still best to choose another type of server).

Client Requirements

Workstations

FolderMatic does not directly interact with client environments, but does so indirectly through Exchange Server Side Mailboxes so any configuration that is compatible with your Exchange Client access environment is acceptable. FolderMatic supports Outlook being in Exchange Cached Mode, but in order for the new folders to appear in the client and PDA, they may need to be added to the Send/Receive Group in Outlook or your synchronization software.

Outlook Web Access

Outlook Web Access is acceptable for accessing folders synchronized by FolderMatic and there are no known issues with folder problems post FolderMatic use in OWA.

Mobile Devices

At the time of publishing, every known PDA available can be used with FolderMatic. Synchronization software supported: Windows Mobile, ActiveSync Intellisync, BlackBerry, Goodlink.

6 Ordering Information

FolderMatic is installed in the trial mode and can easily be converted to a licensed version without removing and reinstalling.

Once you have proven the value of FolderMatic and want to license it, log on as the Service Account, open the FolderMatic Console, select *License* and if you have not already done so, you can select *Step 1* and go to the web and purchase online. If you have already purchased the license, select *Send your License information to Diditbetter.com*. By pressing the *Step 2* button, you will be prompted for the information necessary to send us your licensed user information, your support team and the information we need to create your new license key.

In this screen we are attempting to get all the contact information necessary to support your installation. In the left hand column, select your user type depending on the relationship you have to the licensing organization. This ensures who is the technical contact and that updates and notices get sent to the individual listed there. If you are the end user, select that option and enter your information in the space provided and use the email address you want the key to be sent to. If you are a service provider or reseller, select that option and enter both YOUR and the END USER information, select the product you are trying to register at this time, and select OK.

Note: The FolderMatic license key is specific to the Exchange Server, Service Account and server installed on, not just the end user or reseller information.

Once you have filled out BOTH tabs, select *License What?* and chose the application and the Software Maintenance period you desire. Remember, Microsoft changes their systems all the time and the software needs to change with them. The longer you have software maintenance period, the longer you can get upgrades for **FREE!**

We will process the key based on the request you submit and send it back by return mail. Once you receive it, just copy the entire key into the clipboard and paste it in box number 1.

Each license includes 6 months FREE Software Maintenance and includes 6 FREE email support. The Software Maintenance period includes FREE download updates/upgrades during the membership. You can extend your Software Maintenance plans to one year, an additional 1 year, 2 years or 3 year periods for free downloads. For mission critical installations, Priority Support are also available.

RECOMMENDED! We offer remote certification, installation and configuration for this software for a very reasonable fee from our online store. We offer a Remote Support application facility from our website which usually requires no changes to firewalls and does not require you to divulge any secure information to us. http://www.diditbetter.com/Add2Exchange_Bulletins.aspx?mid=550&ctl=ArticleView&articleId=87. We can also use Remote Desktop Connection (Terminal Services), LogMeIn or Webex if you provide an invitation. In any of these ways you are able to completely control access, maintain your secure environment and shadow the entire session and get a trained expert to configure it right, the first time, or fix it quickly if it is not working.

For current pricing please visit www.DidItBetter.com and click on the Buy Now link taking you to our DidItBetter.com Online Store to purchase via MasterCard, VISA and American Express. Once ready, click on <http://www.diditbetter.com/new+remote+support+session.aspx>.

Users with a purchase-order system should download the order form from the website. If you prefer to fax your order (requires Adobe Acrobat Reader) from our online store, please print and complete the order form and fax it to (813) 972-7986.

We want to help eligible government agencies, academic institutions, and non-profit organizations, so we offer discount pricing. To take advantage of these discounts, please fax your order with a copy of your eligibility certificate for approval.

Once your order is received and payment is processed, visit <http://www.DidItBetter.com/Activate.aspx> for instructions on getting your activation key or read further on in this manual.

After we receive the information we need from you, we will generate a unique key from your address information and send it back to you via email within 48 hours (We activate product Monday thru Friday from 10:00am to 4:00pm EST, excluding holidays).

Once you receive the key by email, please log on to the Exchange Server (Cloning Server) as the Service Account, open up the Console, select *Licensing* from the drop down menu, and select the specific type of folder for which you received a license. From the email, copy and paste the entire key (including dashes) into Box# 1 of the license information field as directed. Experience has found that typing it in is difficult since 0 look like O. Paste the entire key in box #1 and it will automatically parse it out for you.

If the software doesn't do what you need, please let us know. Customization services are available. Please submit your suggestions or requirements to support@DidItBetter.com

7 Quick Start Guide



FolderMatic Clone-A-Folder™ for Exchange Server

FolderMatic™ enables Exchange Administrators (and users with highly escalated Exchange privileges) to define a template structure of Calendar, Contact and Task folders and then rapidly clone the structure to multiple server-side mailboxes. FolderMatic is a .Net application for Exchange 2000, 2003 and 2003 SBS and can be used separately but is often used as a companion product to Add2Exchange for Calendars, Contacts and Tasks™ available from www.diditbetter.com.

If you are considering using both FolderMatic AND Add2Exchange, use the Add2Exchange installation guide for all prerequisites since FolderMatic needs the same permissions as the Add2Exchange Service Account. After you have installed and configured Add2Exchange, you can simply install this software by using the Add2Exchange Service Account. If you are **already using or will use** Add2Exchange for Calendars, Contacts and Tasks, you **SHOULD** use the Add2Exchange Service Account to install and administer FolderMatic. You already have the permissions, so just run the FolderMaticSetup.msi.

If you do not or will not use Add2Exchange, you are **required to perform all the following prerequisites** prior to installation.

DO NOT INSTALL FolderMatic as the default Administrator Account nor any account with Domain Admins group membership since this goes against Microsoft's security model and the software will not operate correctly. These accounts have denied full Mailbox access.

Since FolderMatic Clone-A-Folder for Microsoft Exchange needs the same permissions as Add2Exchange for Calendars Contacts and Tasks, we used the Add2Exchange Manual as a template for prerequisites. Since many users do or will use Add2Exchange, for the purposes of this manual we will call the account you use to install and use FolderMatic, as the Service Account and show you pictures and examples of the Add2Exchange Service Account and configuration. You can call your account anything you want as long as it is not an existing account and you make the new account with the exact privileges and group security we require.

Warning: The Service Account will be made with expanded Exchange privileges to log on, install and use FolderMatic, and this username and password combination should not be given out lightly. In some respects it is one of the most powerful accounts on your system, even more powerful than Domain Administrators. Again, the Service Account is an extremely powerful account and should not be available to all users. Since the program impersonates users in your Exchange Server and can open and read and change any folder in the mailbox, you can NOT install and use this program by "all users", obviously, since most users don't have the appropriate rights. Nor should you copy shortcuts around from desktop to desktop again for the same reason.

Once installed, this tool is typically a tool to be used by the Exchange Administrator logged in as the Service Account to make and clone folders to many users - "en masse". The FolderMatic administrator user will log on as the Service Account to utilize the power of FolderMatic Clone-A-Folder for Microsoft Exchange.

Again, if you **do not use Add2Exchange** and have **not created an Add2Exchange Service account** and

Add2ExchangeSecurityGroup for this purpose, the account you create for FolderMatic can **not** be part of the Domain Administrators Group and Exchange Domain Servers Groups in Active Directory.

If all this seems too much for you, you can always schedule a DiditBetter Remote Support session for our technical staff to assist you and certify your configuration, explain and facilitate the Prerequisites in the section Step by Step Pre-Installation Instructions.

If you are upgrading from a previous version, continue with the next section. Again, to administer FolderMatic, always log on as the Service Account, and run the upgrade to get the latest version of FolderMatic. Unlike Add2Exchange, which has a service it uses, there is no need to uninstall and then reinstall, just install over the original install every time you upgrade.

Current manuals, versions and technical support instructions are always listed on the www.DidItBetter.com website.

8 How Does FolderMatic Work?

You or your Exchange administrator - will log on as the new Service Account with the prerequisite permissions (or use the Add2Exchange Service Account) and then run FolderMatic.exe or the shortcut on the desktop.

FolderMatic uses an expanded privilege user account and mailbox logs in and impersonates users and creates folders from a user defined template structure.

The FolderMatic Administrator (Service Account) will select a mailbox (usually the Service Account's mailbox) to create a template folder structure, and then select the desired number of target users (server side mailboxes from the GAL) you then copy the new structure to every destination, keeping track of successes and failures.

Once you select GO from the FolderMatic interface, the process will complete in a few seconds and then a report of the successes and failures will be presented onscreen.

That's it!

These new folders are often used to create source or destination folders for relationships in Add2Exchange, and they can be used for any business purpose.

FolderMatic does not delete folders from existing mailboxes, or create new mailboxes. FolderMatic does not initialize mailboxes. FolderMatic just makes folder structures of combinations of Calendar, Contact, Task folders and clones the structure to all selected mailboxes that have been opened at least once (initialized).

9 Using FolderMatic

FolderMatic is a server-based and centralized Folder Creation and Management application to clone Outlook folders in a safe, reliable and consistent folder creation.

FolderMatic is currently the most powerful Exchange Folder Creation Tool of its kind in the world. With this new release, FolderMatic has been redeveloped in the latest from Microsoft, the .Net (Dot Net) Framework (will run on both 2.x or 3.x), a broader platform capable of rapidly changing and improving to accommodate the ever changing Microsoft Security and Exchange patches. FolderMatic can be loaded directly on the Exchange Server or on a File Server with Exchange System Manager installed. FolderMatic COULD be loaded on a workstation with Outlook and the optional CDO component installed, but is not recommended since a third party product to eliminate the Outlook Security warnings is required.

Once FolderMatic is set up and configured properly to run, the FolderMatic Administrator makes a template folder structure and when the FolderMatic "GO" button is pushed, the structures from the Source are copied to the Destination mailboxes for Calendars, Contacts or Task folders.

The trial FolderMatic will make folders for 21 days. It will also only allow you to make 20 folder clones and only 3 at a time.

Once licensed, it can make an unlimited number of folder clones as desired at one time.

FolderMatic makes one tree structure at a time and it can be copied to as many uses listed in the Global Address List (GAL) as desired. Obviously the destination user can not be hidden from the GAL during this copy process.

The folders created in FolderMatic can be synchronized to a user's mobile device if it is included in the Send/Receive Settings of ActiveSync, Intellisync, Windows Mobile or whatever other software you use to get information from Outlook into the mobile device.

FolderMatic does not copy existing structures from one mailbox to another, nor does it copy the information contained in the folders.

FolderMatic only works with Server Side Mailboxes, and not personal mailbox folders (not PST files).

FolderMatic has a smooth upgrade path from version to version and has no known incompatibilities.

As always, before installation and use of any software it is always best to create a "brick-level backup" of individual folders and mailboxes to enable to restore the destination folders without restoring the entire Organizational Unit or discrete Exchange Files in case there is a human problem or system failure. To ensure data security, DidItBetter Software recommends www.Symantec.com Backup for Small Business Server or the full package with the Exchange Add-on. Microsoft Backup does not currently provide brick-level backups. Once installed correctly with an account with proper permissions, using FolderMatic is extremely simple.

A word of caution: Since FolderMatic is so powerful, we suggest taking a moment to check the desired results against your settings BEFORE you press the GO! button. At this time, there is no undo button.

Against better advice, some users have installed FolderMatic on a machine with Outlook and the optional CDO

component (Add/Remove Outlook Settings) combined with a third party product called "Express Click Yes" or "Mapilabs" to eliminate the Outlook security warnings. This type of installation is not recommended, but it has been tested and it works. It is not recommended since you are installing a program that will circumvent a security feature, which is never wise.

The new FolderMatic is faster, conserves resources, is more powerful and manageable, works with almost any mobile device, and does not require a machine to be logged on after folder creation is complete.

Note: Often these new folders that are created must be manually added as inclusions to the Send/Receive Settings in Outlook or your synchronization software. If they are not appearing on your mobile device, check there.

10 What's New in FolderMatic 1.0

DidItBetter Software is pleased to announce the release of version 1.0 of FolderMatic™.

This version includes a few improvements and fixes over revisions 1.x including:

Reporting is Clearer

FolderMatic has better reporting for successes and failures and automatically time dates and stamps the reports.

Unlimited Number of Folder depths Built from one template

FolderMatic now can make a template of unlimited depth of folders of any folder combination of Calendars, Contacts and Tasks and then copy it to an unlimited number of selected domain users server side mailboxes.

Optimized for speed

The folder creation routine has been optimized for speed for more controlled resource management.

11 Step by Step Instructions

Important: FolderMatic 1.0 requires the .Net Framework and if it is not installed, it will require a reboot. In some instances, the installation procedure will require a reboot for the installation to complete properly. Plan your installation for a service maintenance window as appropriate.

If this is an **upgrade** from a previous FolderMatic version, please continue to this section: Installation of FolderMatic and Upgrade Process.

NOTE: Please implement ALL OF THESE PREREQUISITES in the order listed below prior to installation of the software!

- Back up your folders before installation to ensure your data.
- Ensure the .Net framework 2.x or 3.x or later has been installed and all Service Packs have been done in Add/Remove programs and Microsoft Update. Use the new Microsoft Update to update all Windows machines and Microsoft products on the server and be sure to reboot afterwards. This is the number 2 most common support issue.
- Please see section **System Requirements** to make sure your server has the minimum Hardware and Software requirements.
- If not installed on the Exchange Server, the FolderMatic Software can be installed on a server dedicated for other purposes. Although the server may be used for other purposes such as a Blackberry Server, Backup Server, or File Server, the server should not be used daily as a user's workstation. It is not recommended that you install FolderMatic on a user's workstation unless Outlook is installed without the optional CDO component, Exchange System Manager is installed, or the least recommended configuration is Outlook installed with CDO and the Outlook security warnings have been eliminated with a third part program such as **Mapi Labs** or **Express Click YES**. Since these security warnings are designed for security, eliminating them is not the best configuration to enhance your Email security.

11.1 Conditional Prerequisite: Verify Exchange Collaboration Data Objects (CDO)

Verify that Collaborative Data Objects (CDO) is running on the server you are using for synchronization.

Normally FolderMatic is installed on the Exchange Server. If you are installing FolderMatic on your Exchange Server, do all Microsoft updates and go to the next section. CDO is already installed.

If you are installing FolderMatic on a utility server, simply install the same version of Exchange System Manager that your Exchange Server is using and then do all Microsoft Updates and reboot afterwards.

11.2 Prerequisite 1: Create a Security Group

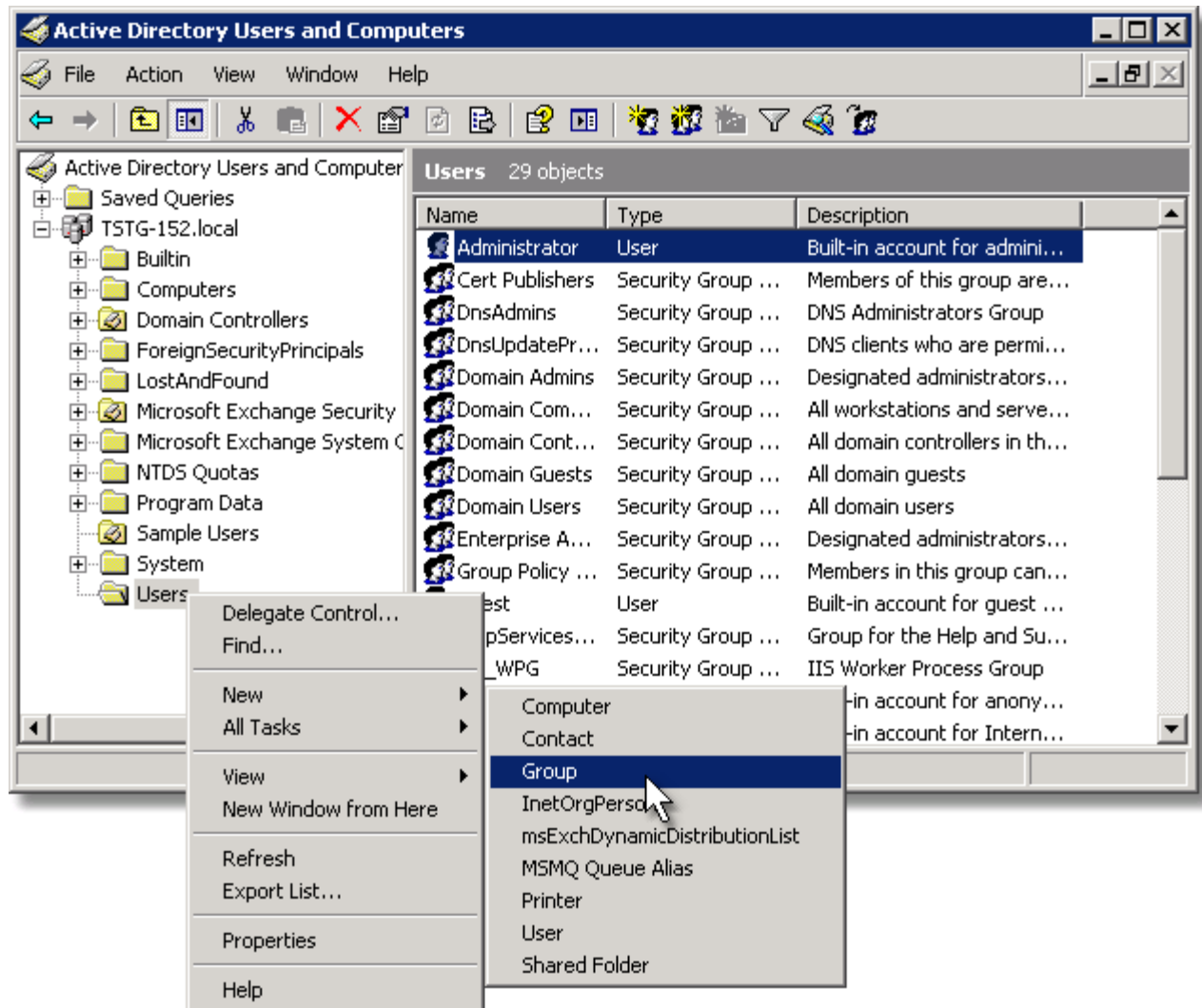
IF you are using our other product: Add2Exchange for Calendars, Contacts and Tasks and have already created an account for the purpose, then use the "ZAdd2Exchange" account (or whatever you named it) and skip to the next major heading Installation of FolderMatic. If you are not, then we have included our normal

procedure for our Add2Exchange Service Account below.

Tip: Do not use an existing group for this purpose. Call the Security Group anything you want, but be descriptive and be sure to make a new group. For more information on Exchange and Security Group permissions, refer to <http://support.microsoft.com/kb/292509/en-us>.

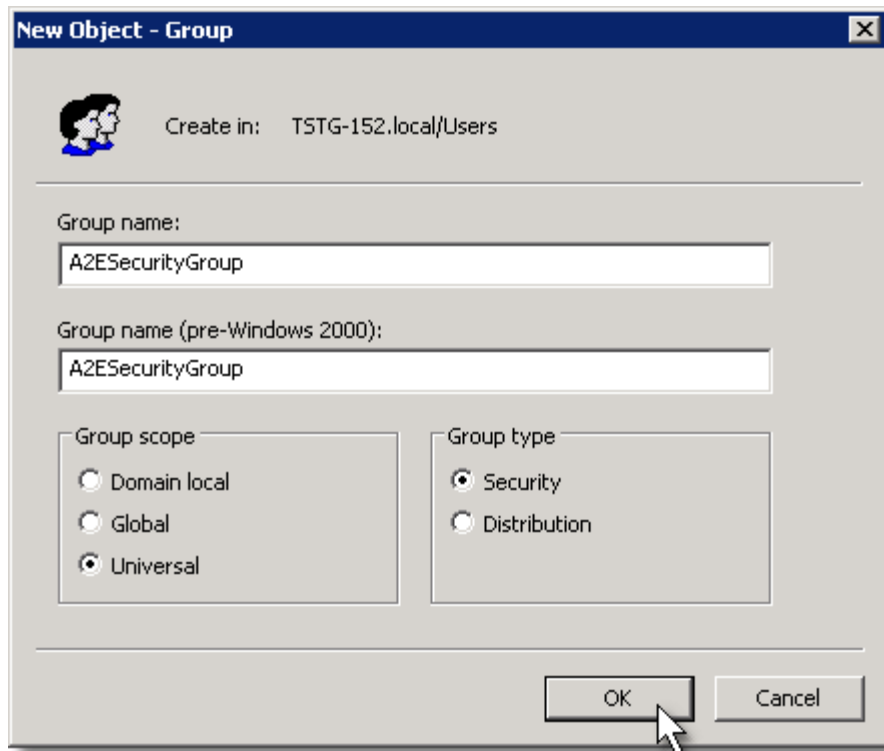
1. Open the Active Directory Users and Computers console from the Administrative Tools menu.

Creating the FolderMatic Security Group in Active Directory

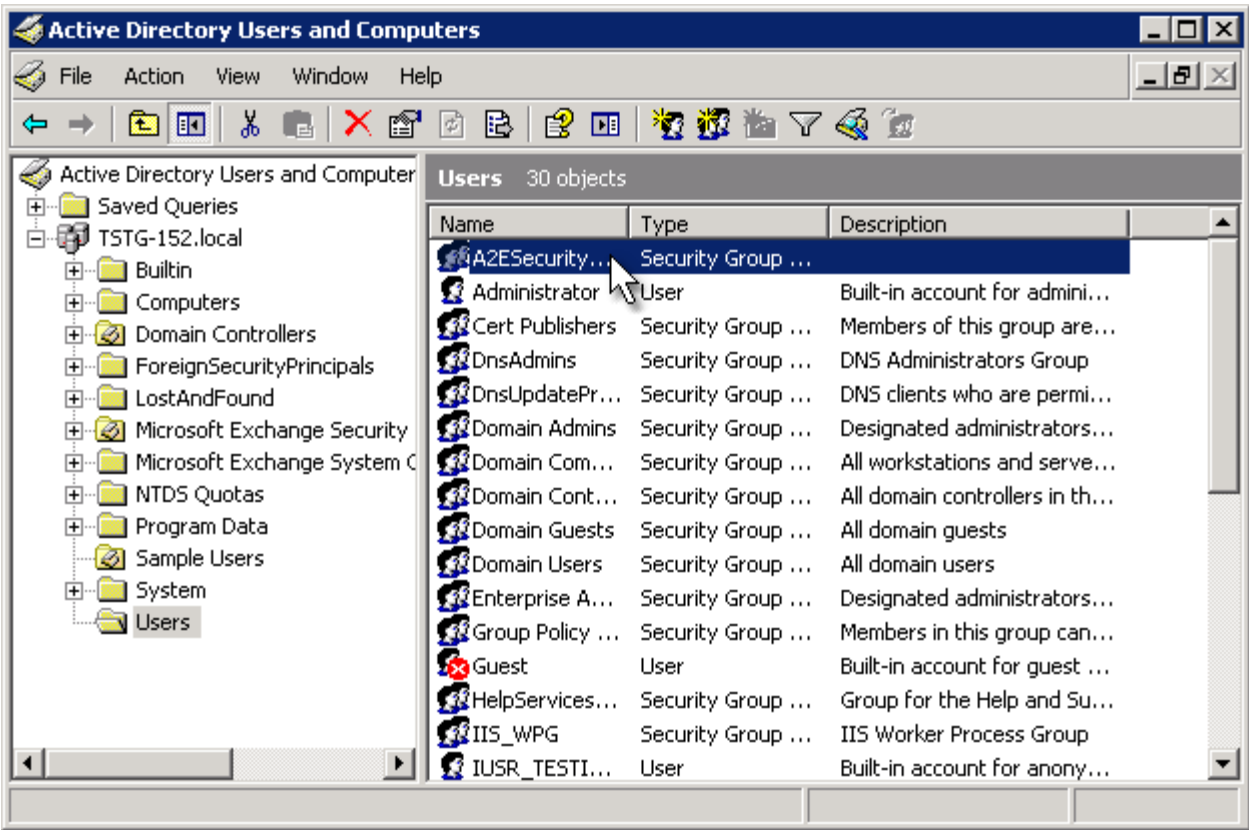


2. Select the Active Directory container in which you created the Service Account. Either click the *New Group* icon or right-click the container and select *New > Group*.

New Group Dialog

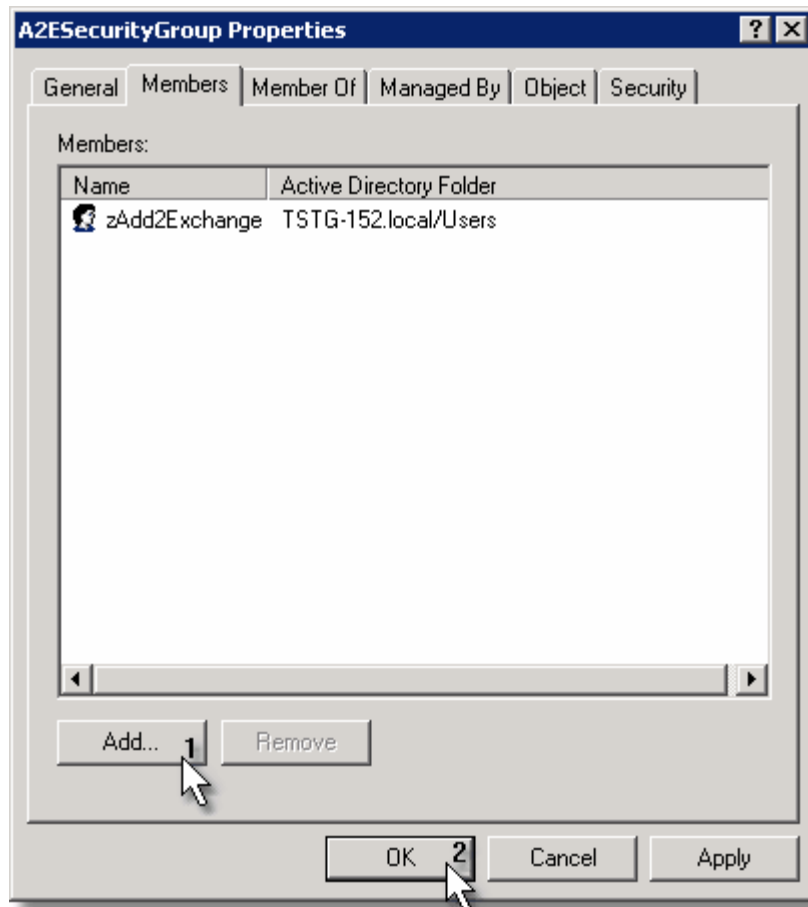


3. Name the Security Group anything you want. We use the same technology for Add2Exchange and have used those screenshots here. Choose the widest scope available (at least *Global*). Click *OK*.

FolderMatic Security Group

4. Double-click the Security Group.

Security Group Members



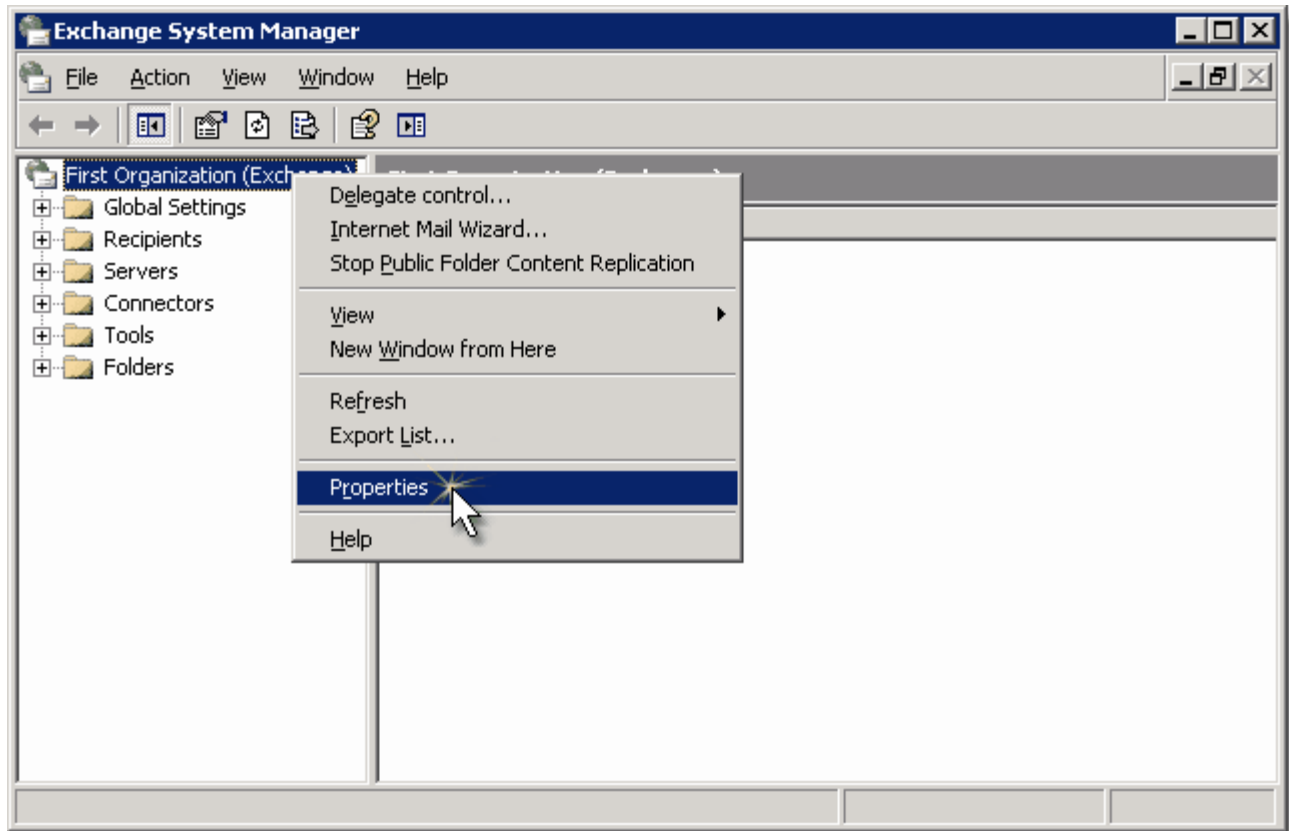
5. Click *Add...* and select the Service Account that will be used. Since FolderMatic is a companion product, we used *zAdd2Exchange* in the examples. Click *OK*.

11.3 Prerequisite 2: Give the Add2Exchange Security Group Exchange Rights

Open Exchange System Manager and give administrative permissions to the Security Group and make sure those rights inherit to the Mailboxes and Public Folders.

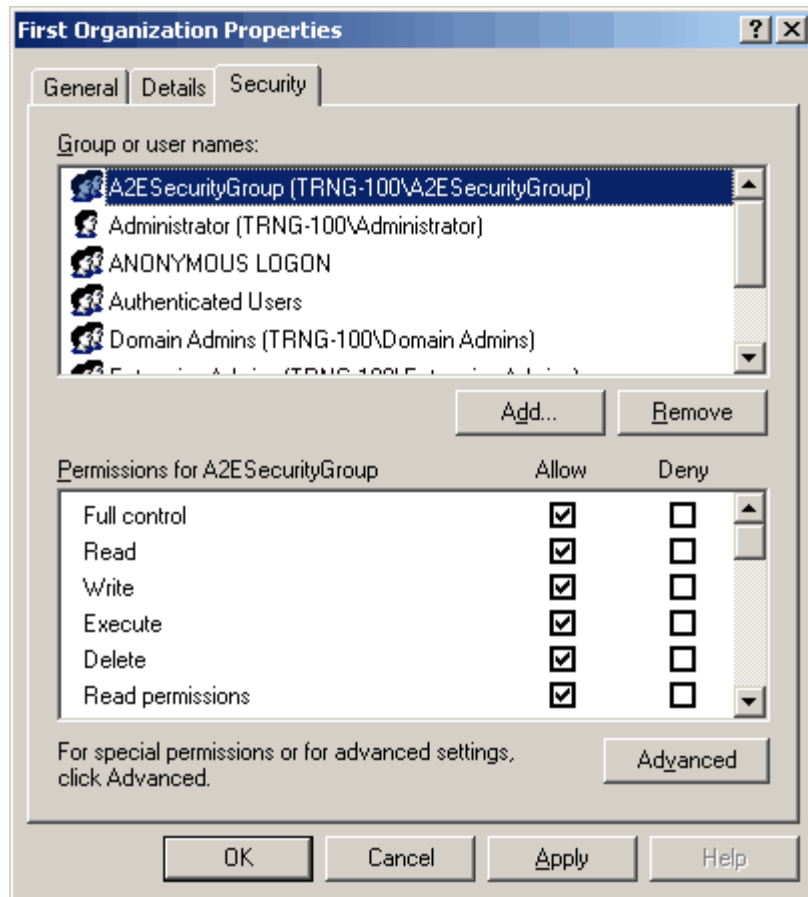
We are adding the Security Group so it will inherit the permissions to your entire organization and so administrative rights will not have to be given manually to each user.

Exchange System Manager



1. Open *Exchange System Manager*. Right-click the top level of the organization and select *Properties*.

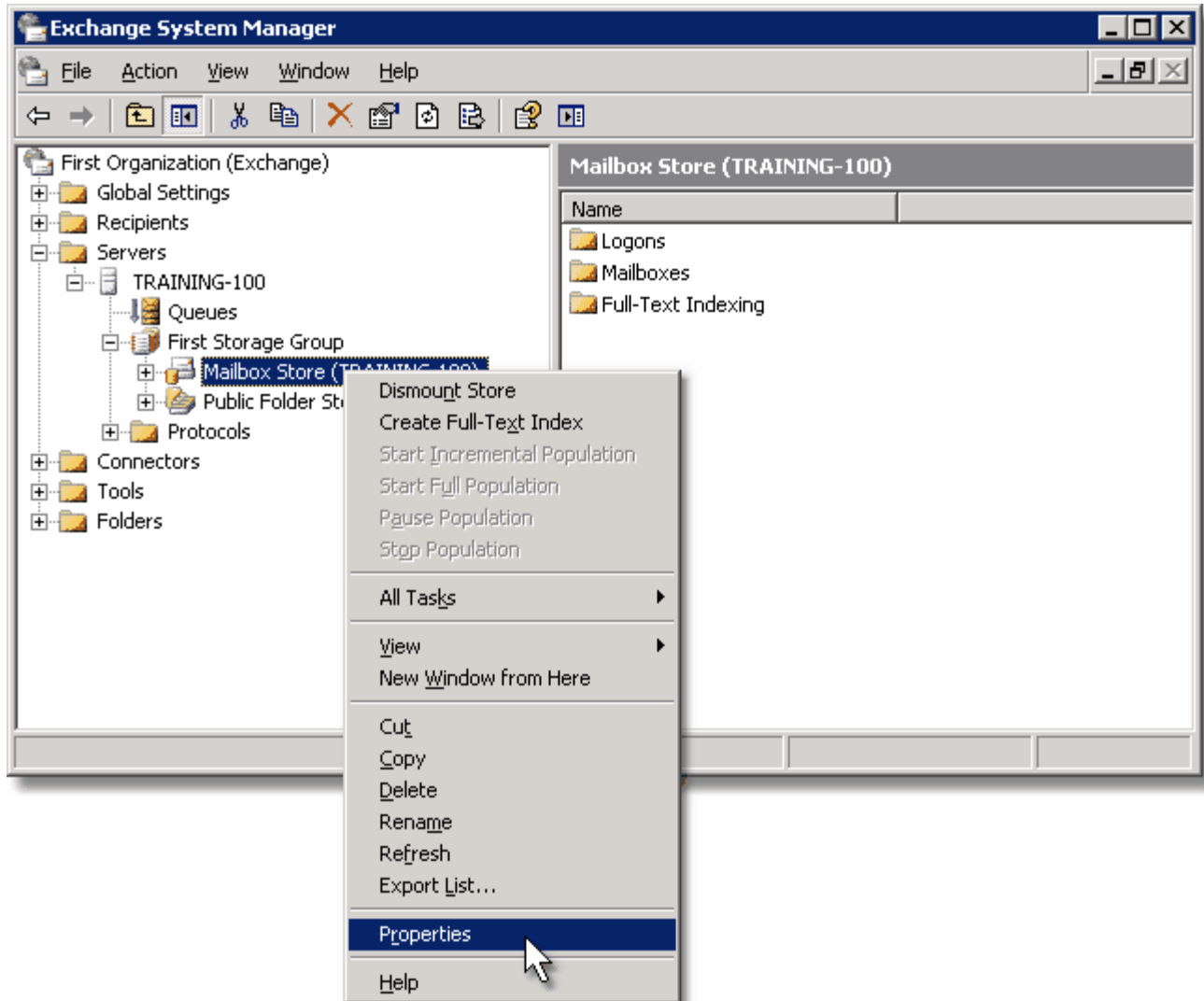
Adding the FolderMatic Security Group



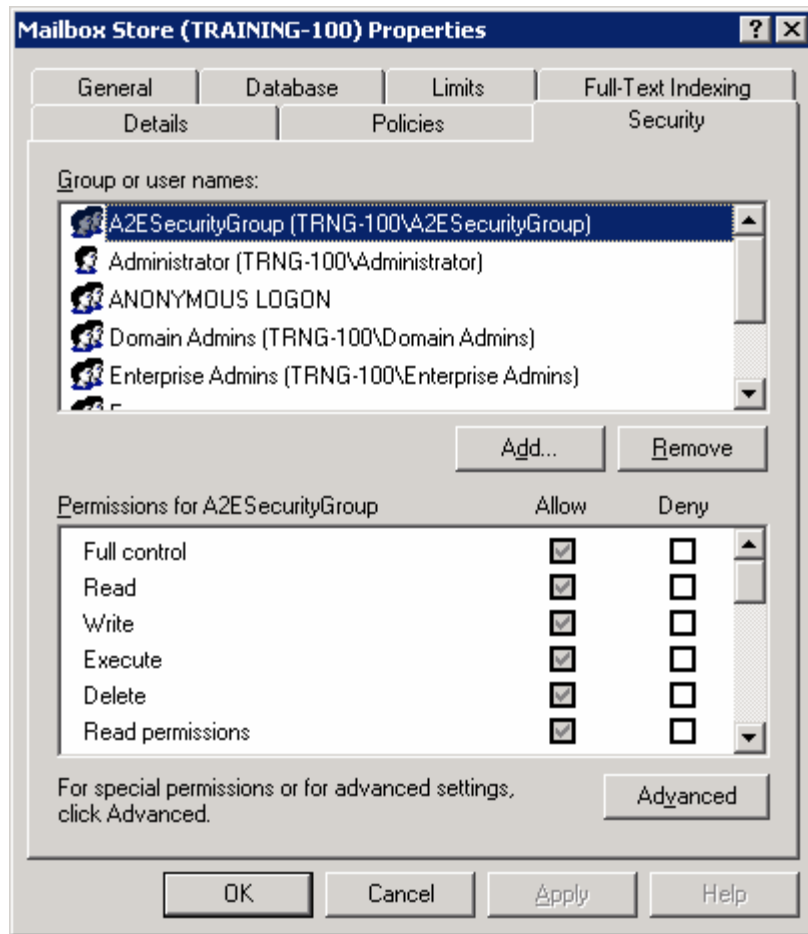
2. Select the *Security* tab, click *Add* and select the FolderMatic Security Group. Click *OK*.

Note: The *Security* tab is not enabled by default. Included in the FolderMatic download zip file is the *ExchangeRegistrySecurity.exe* helper program. This program automatically adds the registry key that Microsoft recommends in the tip above to add manually. Run this on the Cloning Server and it will add the necessary registry entry for the current user to be able to see the Exchange Security Page in Exchange System Manager. For more detailed information on what this program does, or to add the tab manually, please reference Microsoft's instructions at: [Http://support.microsoft.com/default.aspx?scid=kb;EN-US;264733](http://support.microsoft.com/default.aspx?scid=kb;EN-US;264733)

Verifying Inheritance to the Mailbox Store



3. Expand the Exchange Server Storage Groups. Right-click the first Private Mailbox Store and select *Properties*. Repeat this process for each Mailbox Store (do not verify Public Folder Stores yet).

Mailbox Store Security Tab

4. Select the *Security* tab and verify that the FolderMatic Security Group appears with full permissions. The *Allow* check boxes may be grayed out if the security settings were inherited as in this example. What matters is that the check marks appear in all boxes for the Security Group.

Note: If you are using Add2Exchange: Former versions of Add2Exchange required configuration of the Service Account (as opposed to the Security Group) on the Mailbox Stores. This configuration is deprecated and the Service Account must be removed from any mailbox store permissions. Only the Security Group should appear in the *Security* tab.

Note: In most Exchange installations, adding the Security Group automatically applies all of the appropriate administrative permissions to the Mailbox Store and Public Folder Store. It does not give Client Ownership and Folder Contact, which are client permissions. Also, in some cases, you may not have inherited permissions to Public folders or mailboxes and you will have to add it specifically to the Mailbox Store or individual mailboxes or allow inheritance (which is generally a more accepted way to administer your Exchange Server). Tip: Make a note to discuss with your Exchange Administrator or Computer Service provider why your Exchange Server does not have inheritance.

If the Security Group is not listed in the Mailbox Security properties, your organization does not have inheritance

turned on in your Exchange Server hierarchy. You can either add the Security Group there now or enable inheritance. For the purpose of this installation, it is sufficient to just add the Security Group with full rights now.

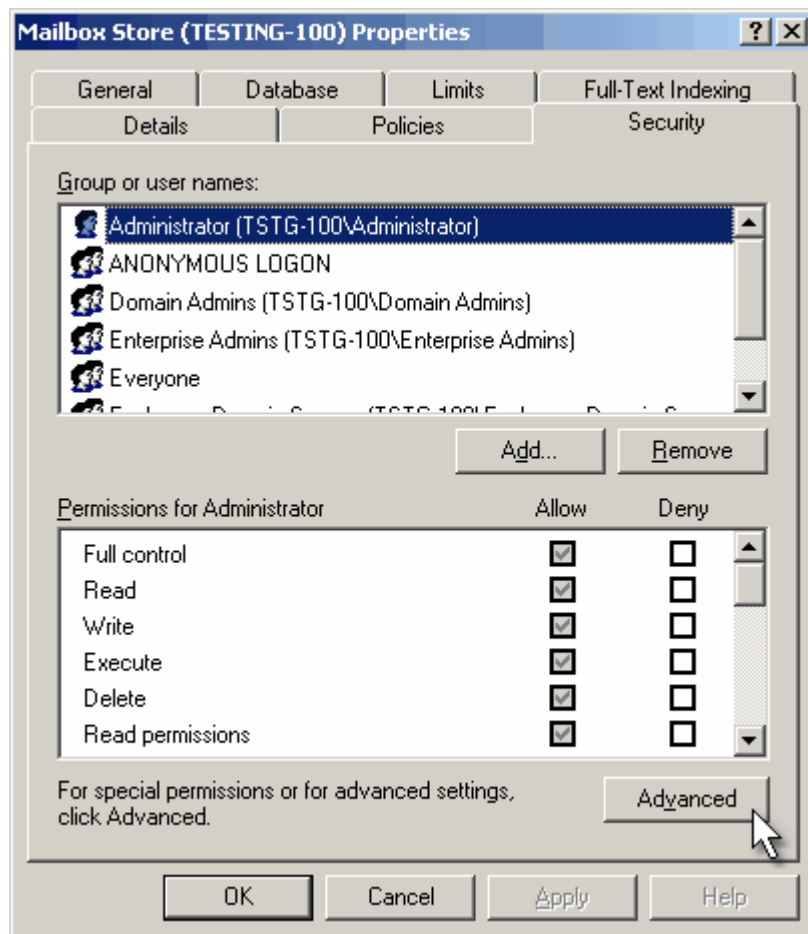
Tip: If when making an Relationship you are unable to see any folders in a specific mailbox while building the Relationship, this is an indication that the Service Account does not have the proper permissions. In fact, it is still explicitly listed in the permissions of the mailboxes or a parent object or has the incorrect memberships or the memberships were incorrectly applied. Make sure you take careful note to apply the correct permissions to the folders and mailboxes.

Enabling Inheritance

If, after careful consideration, you decide to enable inheritance for your Exchange Organization and the Objects it contains, follow these steps:

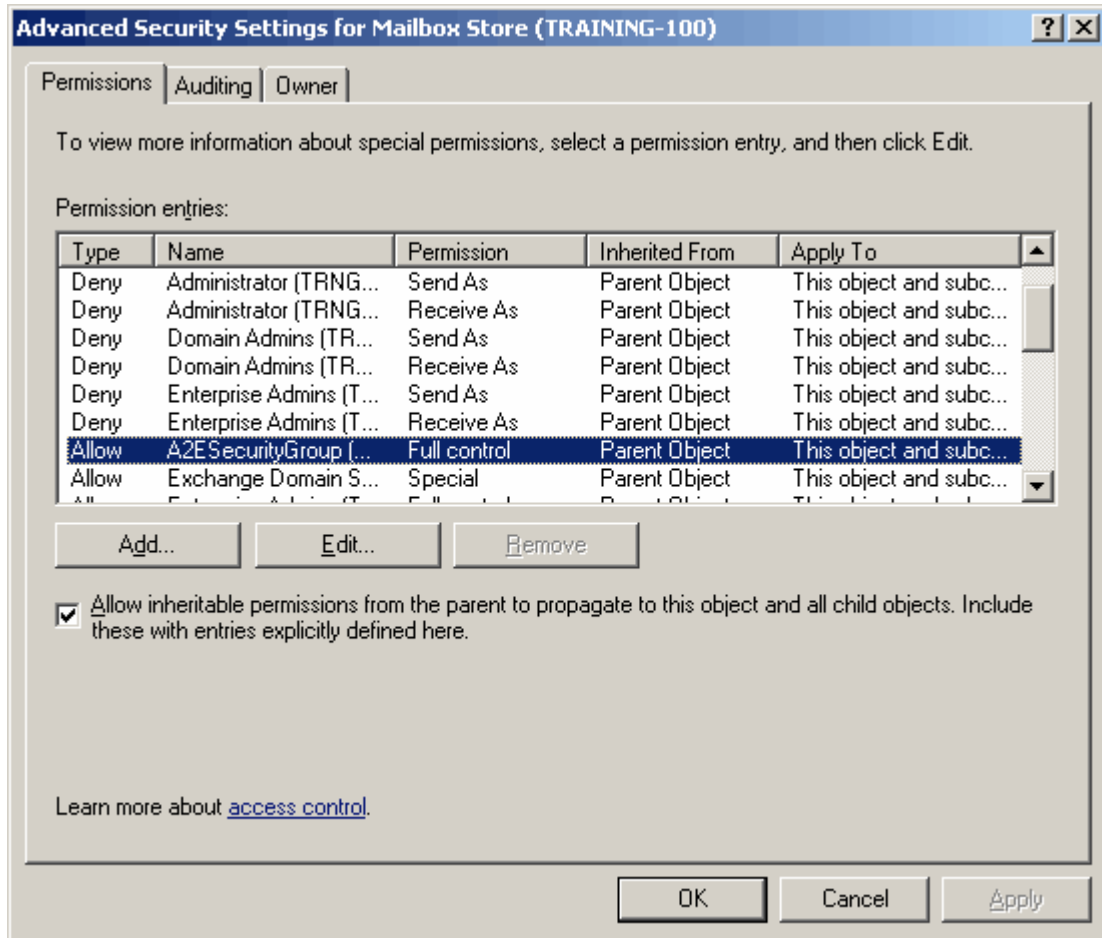
1. Start *Exchange System Manager*. Right-click the Mailbox Store in question and select *Properties*.

Mailbox Store Security Tab Advanced Button



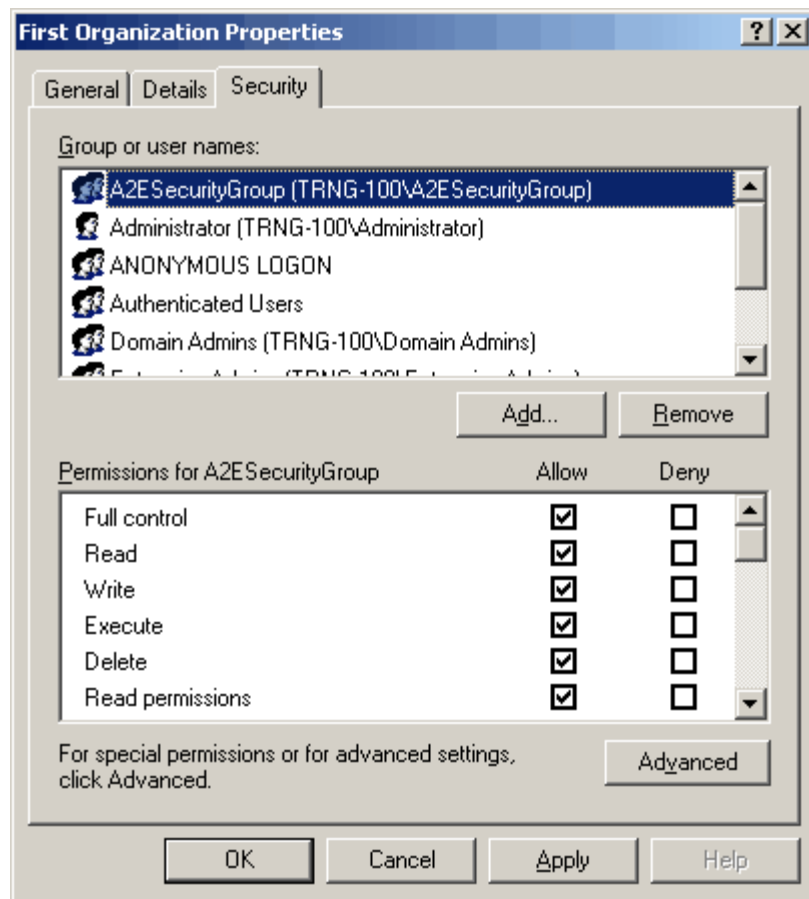
2. Click *Advanced*.

Security Inheritance Settings



3. Check the "Allow inheritable permissions..." checkbox. This will enable inheritance as far up the tree as this box is checked at each level.

Mailbox Store Security Tab



If you have inheritance enabled all the way up to the top organizational level (where we configured the Security Group), then you will see the Security Group has been added to the permissions of the Mailbox Store.

11.4 Prerequisite 3: Create the Service Account

Note: If you are installing FolderMatic with Exchange 2007, skip this section and read the entirety of the section *Appendix A: Exchange 2007 Permissions Setup*, then continue with the section *Prerequisite 4: Make the Service Account a Local Administrator*.

Possible names you can make up for the Service Account could be something like zAdd2Exchange or zAdd2Exchange for the Service Account. However, we suggest creating some other name and a strong password to enhance your system's security.

Make a new user account to use as the Service Account. This account will serve as the logon for all FolderMatic administrative tasks.

Active Directory User Properties for the Service Account

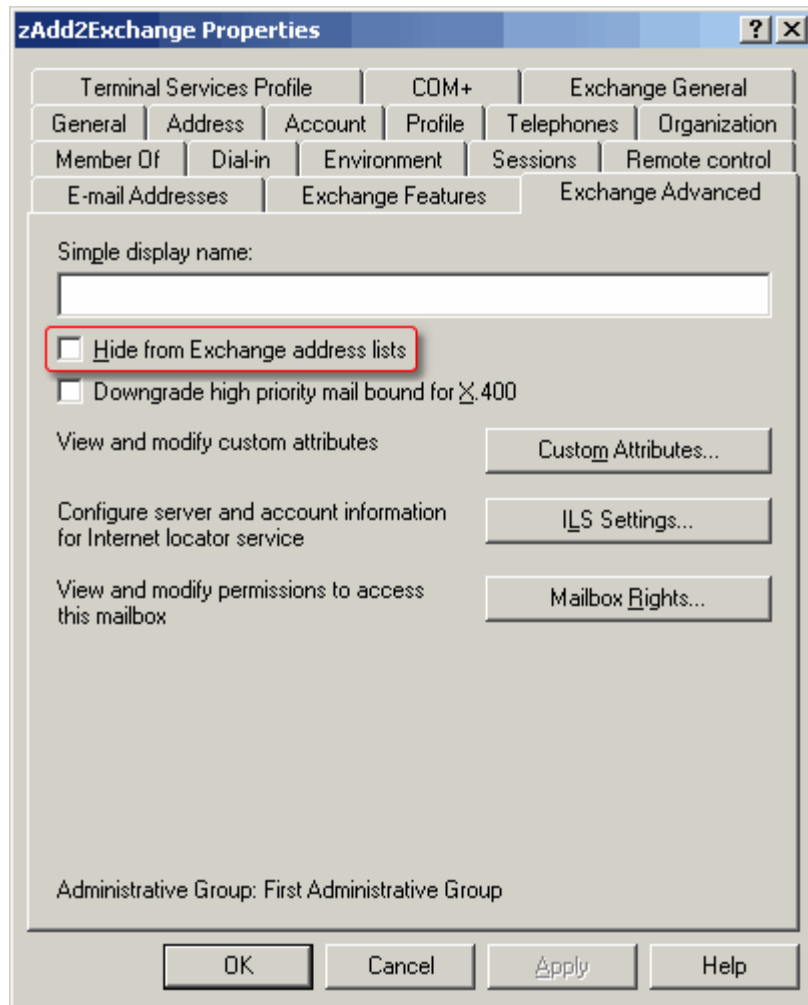
The screenshot shows the 'zAdd2Exchange Properties' dialog box. The 'General' tab is active. The 'First name' field contains 'zAdd2Exchange' and the 'Display name' field also contains 'zAdd2Exchange'. A yellow callout box with black text says 'These should match. Do NOT leave Display Name blank.' The 'E-mail' field contains 'zAdd2Exchange@trng-100.local'. The dialog has buttons for OK, Cancel, Apply, and Help.

When you create the account, make sure the mailbox Display Name is the SAME NAME as the account name. A good method of this happening automatically is to use ONLY the first name field when creating the Service Account in Active Directory. (This is a Service Account so the middle and last name are not necessary).

IMPORTANT: The Service Account also **CANNOT** have a blank Display Name. This effectively hides the account from the Global Address List.

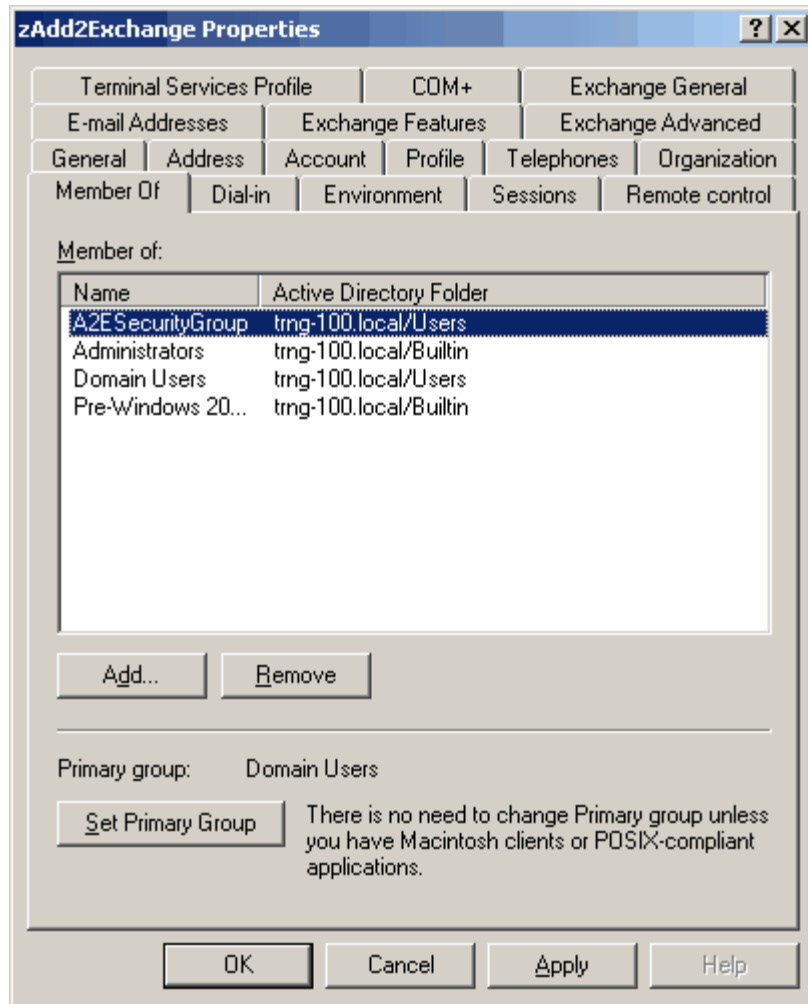
Having the display name and the username the same is critical for backward compatibility of servers migrated from Exchange 5.5, so if this applies to your organization, please pay particular attention to this. (Exchange 5.5 is no longer supported by Add2Exchange, but more recent versions of Exchange may still have mailboxes migrated from 5.5 systems)

Tip: Since the Service Account **CANNOT** be hidden from the Global Address Book, it is wise to name it something with beginning with a "z". This way the name goes to the bottom of the Global Address List and does not confuse your users. The Service Account mailbox is not used by Add2Exchange, the account simply needs Exchange access which requires an active mailbox.

Verifying Service Account Not Hidden from Address Lists

Give the Service Account the necessary (and only the necessary) security group memberships.

Service Account Group Memberships



Once added, select the Service Account, go to the Properties of the user, and select the tab Member Of (in 2000 and 2003).

Add the following Group Memberships:

- *Administrators*
- *Domain Users*
- *Pre-Windows 2000 Compatible Access*
- *FolderMatic Security Group*

Add ONLY the memberships shown unless special circumstances apply. You do not need to add as part of the Terminal Services or Remote Desktop Group because the Administrators group usually already has this access.

Do not add any unnecessary memberships such as *Domain Administrators* or *Exchange Domain Servers* or *Enterprise Administrators*. Adding these memberships removes the mailbox permissions necessary for the Service Account to perform synchronization.

11.5 Conditional Prerequisite: Mailbox Management through Outlook

Many tasks in administering FolderMatic can be simplified by providing a view of many user's folders in a single Outlook profile. This step is also useful when trying to initialize the Service Account mailbox.

Having an easy way to move between user accounts makes it easier to both verify when FolderMatic has successfully cloned, as whether specific folders have been made through FolderMatic. The best way to provide this access is by making use of the Service Account's special mailbox permissions through an Outlook profile.

A profile with these permissions can add the mailboxes for which you have Relationships in FolderMatic in one single location, making it easy to switch back and forth and verify synchronization, or more specifically in the next step approval that the Upgrade process was successful at "de-synchronizing" with the older technology, to make it ready to re-synchronize with the newer Add2Exchange 1.0 technology.

Since installing Outlook on the Exchange Server is not supported by Microsoft and is not compatible, you must use Outlook on a workstation separate from the server. You should log on to the workstation as the Service Account in order to use the power of the account.

If you log into a workstation as the Service Account, and try to run Outlook, the Outlook wizard should will automatically prompt you to create a new profile. If there is no icon, you can select the *Mail* icon from the Control Panel and *Show Profiles*, add a new one assuming Outlook is installed. After you have done so, you can use the following instructions to modify the existing profile.

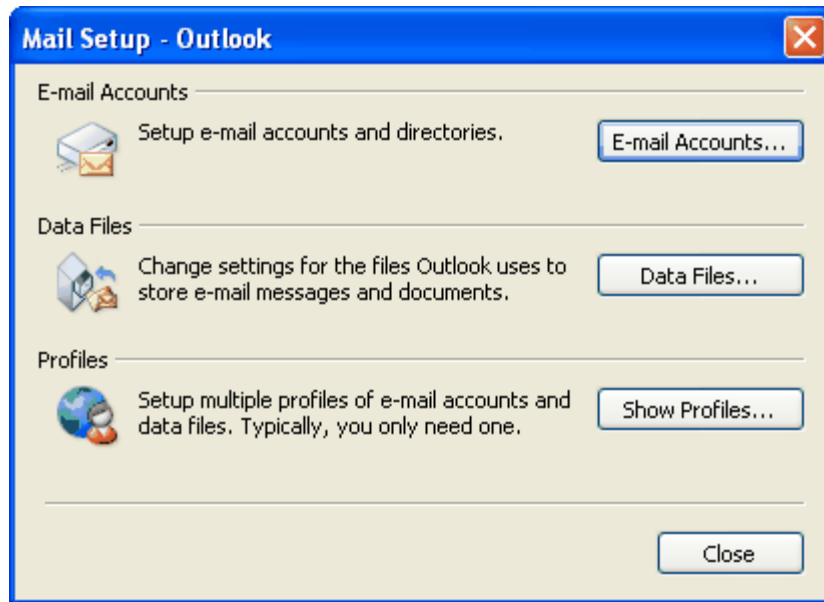
Follow the instructions given here to create the new profile.

First, open the Mail Control Panel by selecting it from the Start Menu:

Mail Control Panel

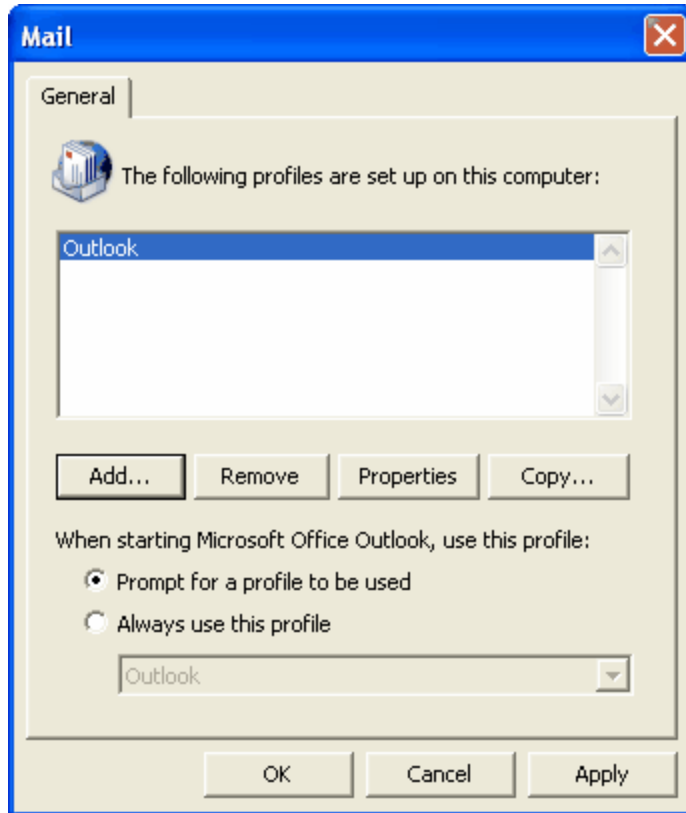


You will see the Mail Control Panel:

Mail Setup Control Panel

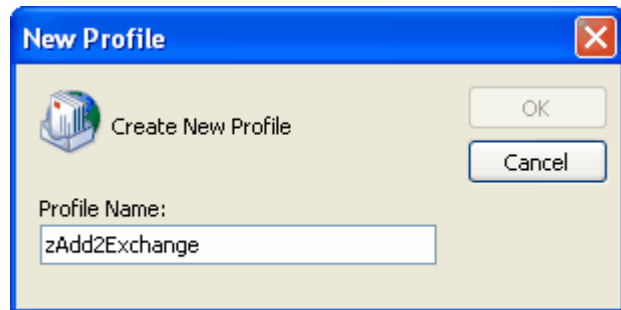
Click *Show Profiles...* The Profile Selection Dialog appears:

Profile Selection Dialog

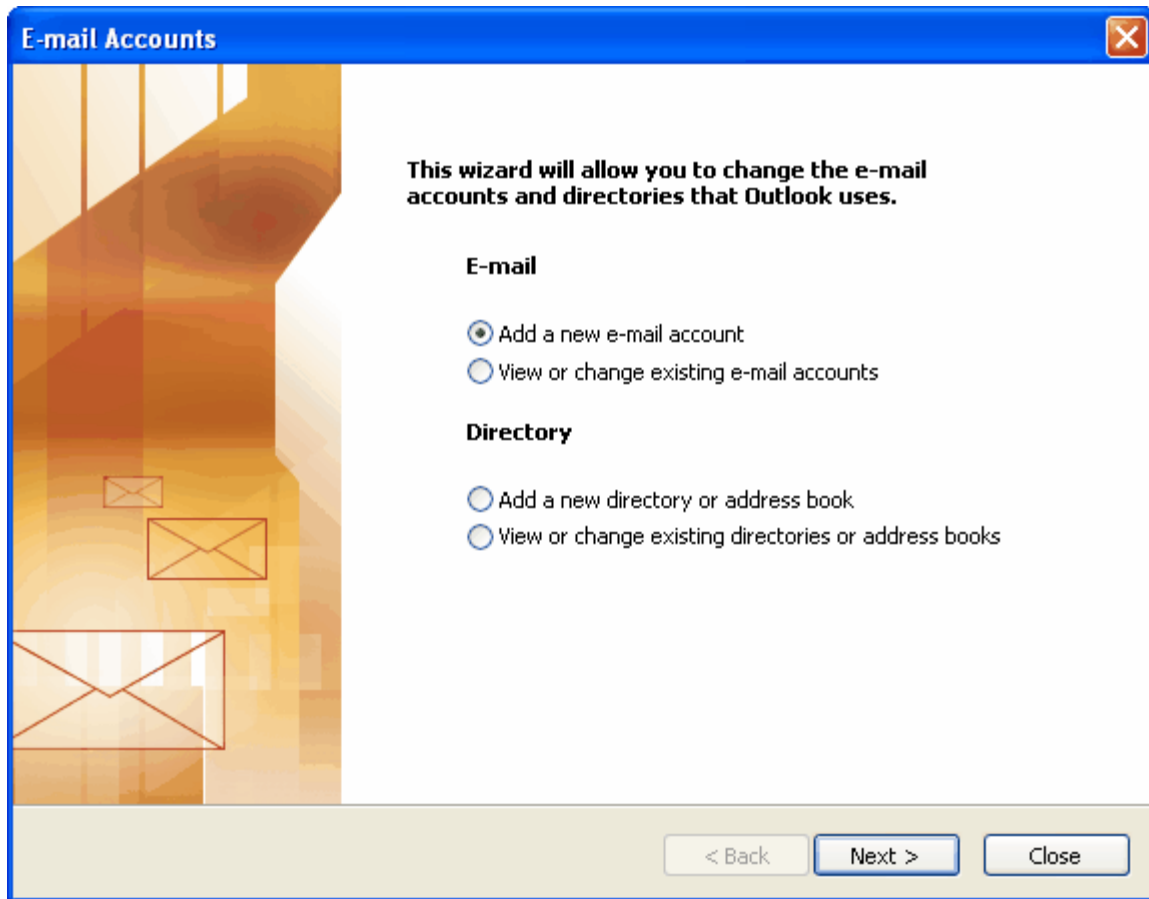


Select *Prompt for a profile to be used*. Click *Add...*

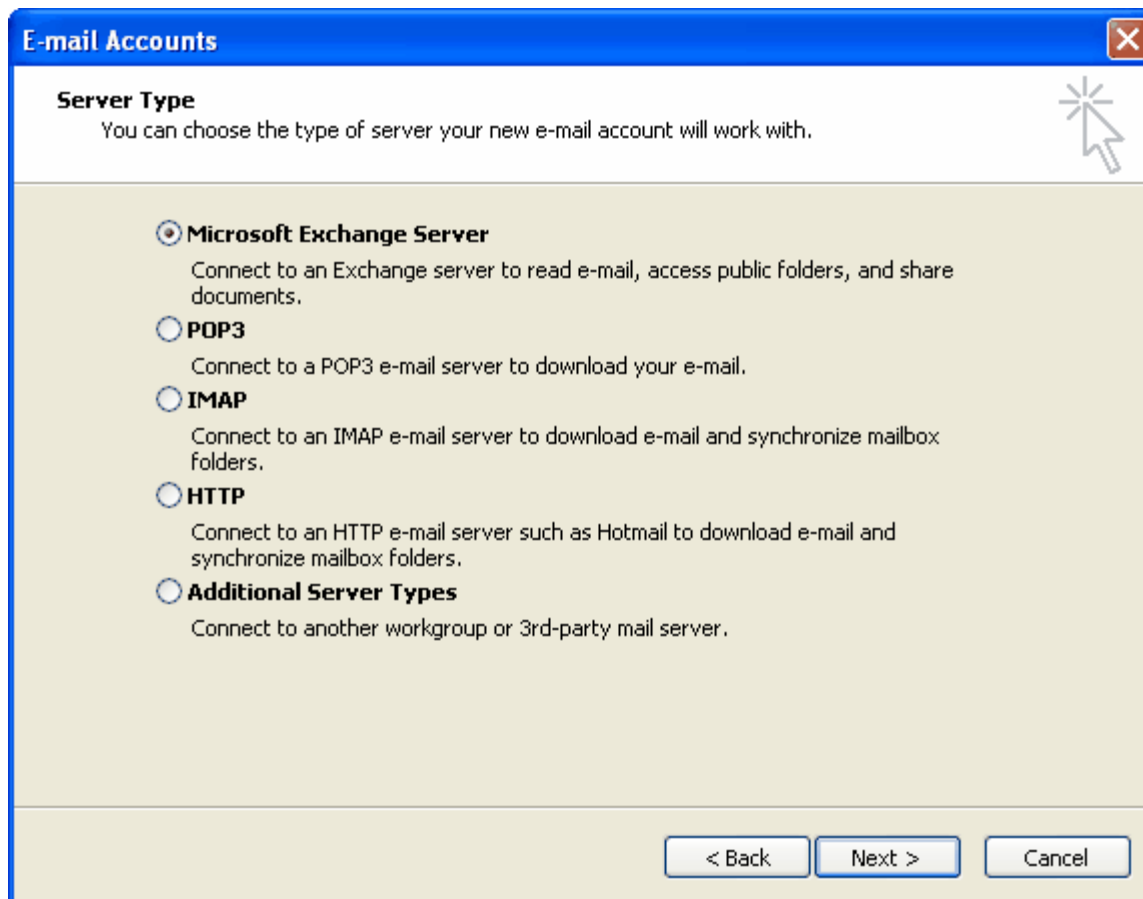
New Profile Dialog



Name the new profile after the Service Account (in this example, "zAdd2Exchange") and click *OK*.

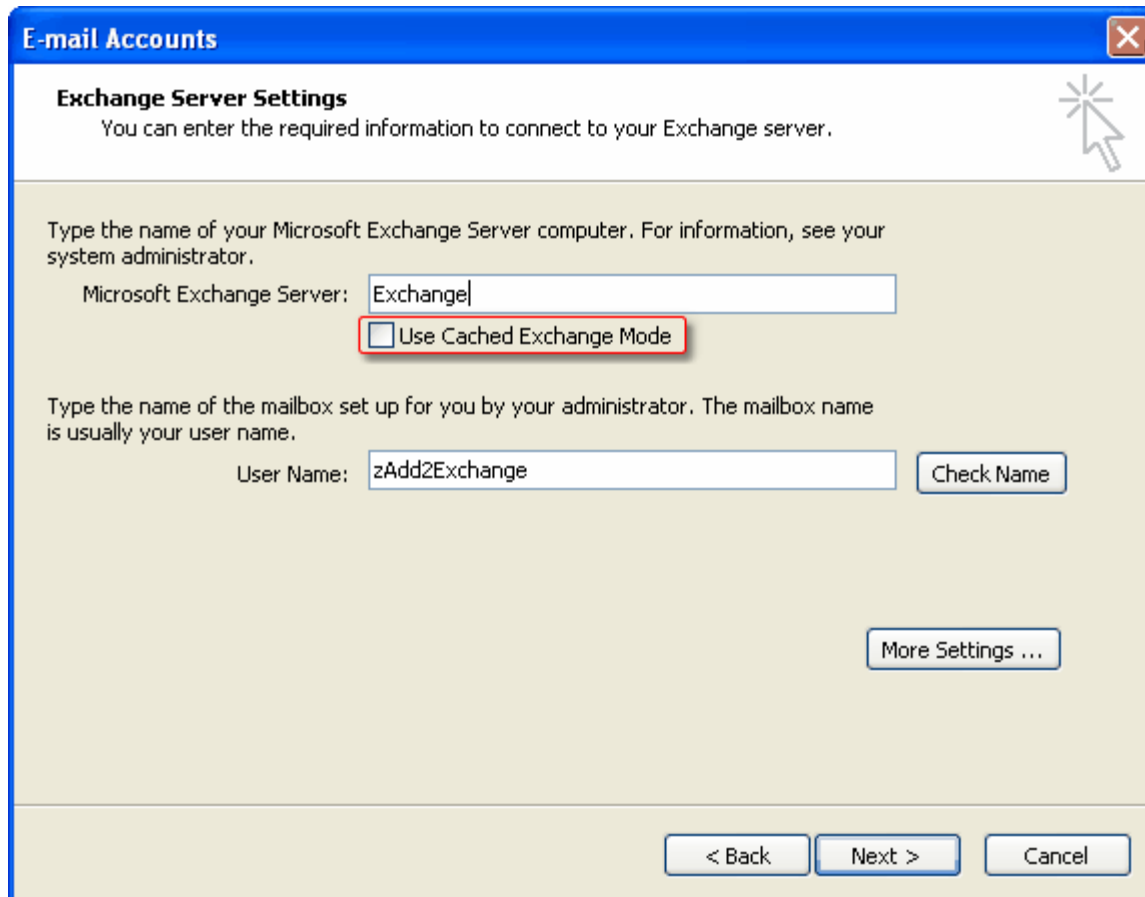
E-mail Account Dialog

Click *Next >* to add a new e-mail account.

Server Type Dialog

Select *Microsoft Exchange Server* and click *Next >*.

Exchange Server Settings Dialog

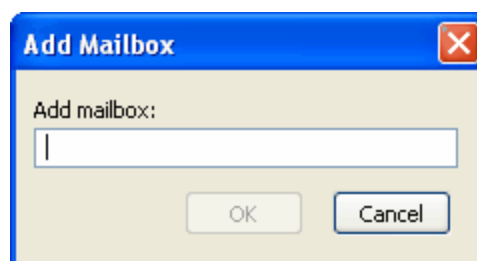


The screenshot shows the "E-mail Accounts" dialog box with the "Exchange Server Settings" tab selected. The dialog has a blue title bar and a close button in the top right corner. The main area is light beige and contains the following text and controls:

- Exchange Server Settings**
You can enter the required information to connect to your Exchange server.
- Instructions: "Type the name of your Microsoft Exchange Server computer. For information, see your system administrator."
- Text field: "Microsoft Exchange Server:" with the value "Exchange" entered.
- Checkbox: "Use Cached Exchange Mode" (unchecked and highlighted with a red box).
- Instructions: "Type the name of the mailbox set up for you by your administrator. The mailbox name is usually your user name."
- Text field: "User Name:" with the value "zAdd2Exchange" entered.
- Button: "Check Name" (disabled).
- Button: "More Settings ..."
- Navigation buttons at the bottom: "< Back", "Next >", and "Cancel".

Enter your Exchange Server name (in this example, "Exchange") and Service Account name. If at all possible, uncheck *Use Cached Exchange Mode*. Click *More Settings...*

Add Mailbox Dialog



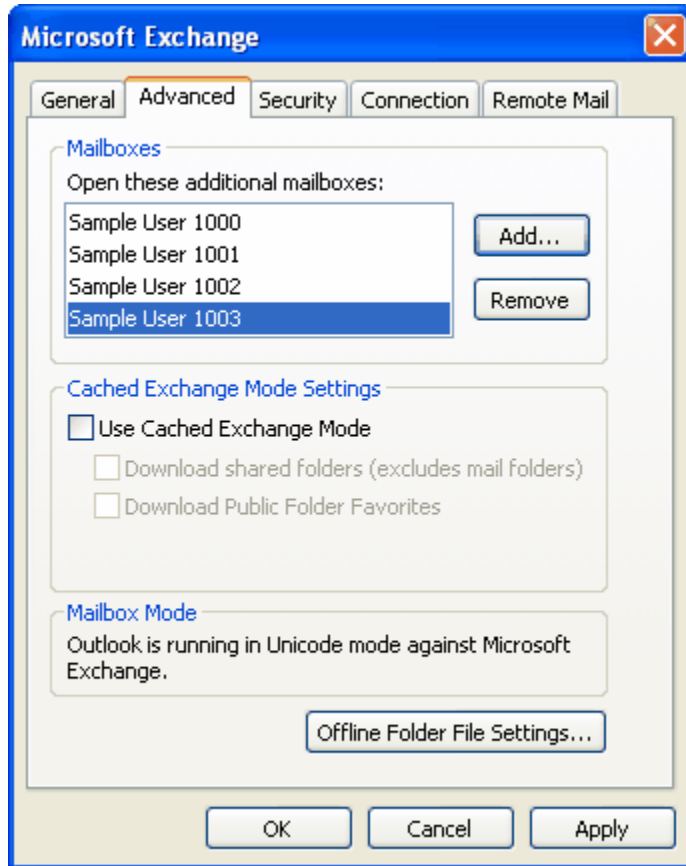
The screenshot shows the "Add Mailbox" dialog box. It has a blue title bar and a close button in the top right corner. The main area is light beige and contains the following text and controls:

- Text: "Add mailbox:"
- Text field: An empty text field with a vertical cursor.
- Buttons: "OK" and "Cancel".

Enter the username of one of your user accounts that will be synchronized by FolderMatic and click *OK*. Repeat until you have entered all of your users.

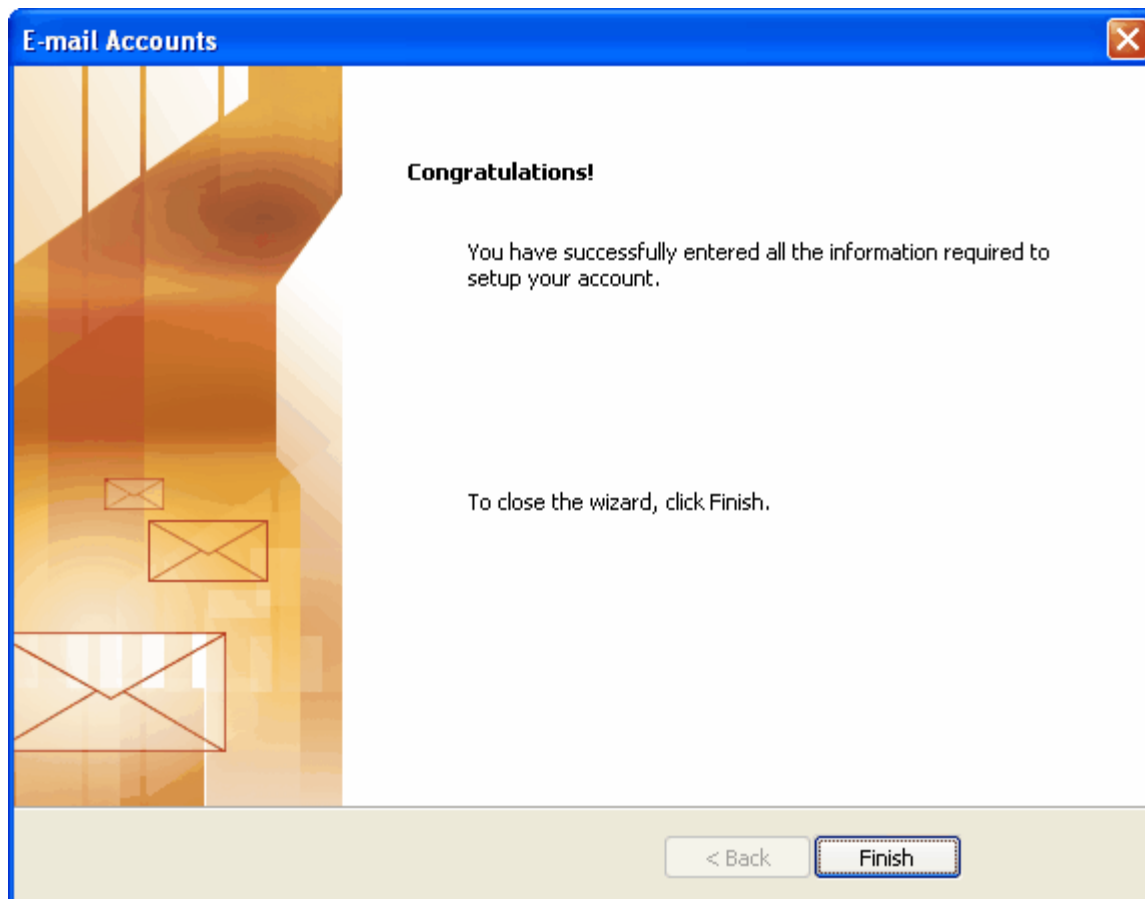
When you are finished, your list will look similar to the following:

Mailbox Selection Dialog



Click *OK*. Back at the main dialog click *Next >*.

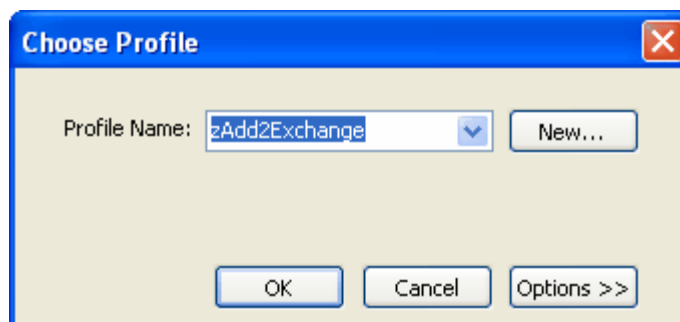
E-mail Accounts Dialog



Click *Finish* to close the wizard. Exit the Control Panel.

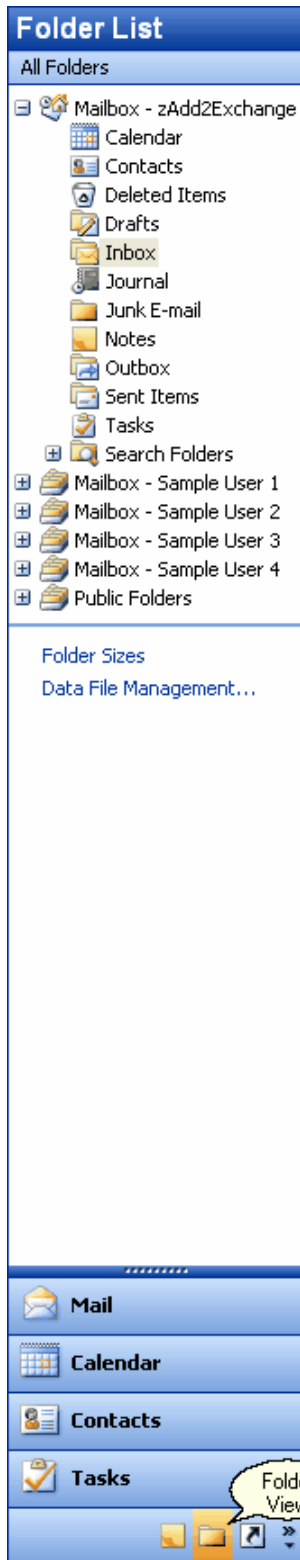
Once you have completed the profile setup, Outlook will prompt you for which profile you would like to select when you start Outlook. Select the Service Account profile:

Default Profile Selection Dialog



Choose the folder view from the bottom of the Folder List:

Folder View in Outlook



The user mailboxes will appear after the Service Account Mailbox in the list.

Since many users use the Service Account mailbox to create folder structures, this mailbox can represent a master folder structure for your users and visual inspection that the process of Folder Cloning actually took place.

Since many users also use Add2Exchange, this technique is used to verify replication.

11.6 Prerequisite 4: Initialize the Service Account Mailbox

If you have not set up mailbox management through Outlook as outlined in the previous section, you must initialize the Service Account mailbox and Active Directory attributes by opening the mailbox in Outlook or Outlook Web Access.

Once you open the Service Account's mailbox, Exchange will fully inherit all the permissions to the mailbox and create the Active Directory mailbox attributes for the account.

Initializing the Service Account Mailbox with Outlook Web Access.

Open up Outlook Web Access (OWA) for the Service Account so the profile is fully initialized by Exchange. Typically you can point your web browser to <http://localhost/exchange> to do this.

Initializing the Service Account Mailbox with Outlook from a Workstation

Important: Do NOT install Outlook on either your Exchange Server nor the Cloning Server.

Log on to a workstation as the Service Account and create an Outlook profile through the Mail Control Panel applet.

11.7 Prerequisite 5: Make the Service Account a Local Administrator

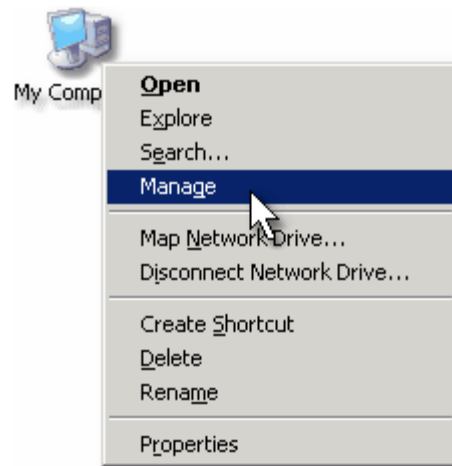
Make sure the Service Account is part of the local server Administrators Group of the Cloning Server and the Exchange Server so it can install software and test for the Exchange Services status.

Since FolderMatic will need to be installed while logged in as the Service Account you created, the Service Account MUST be part of the local Administrative Group to the server during the install.

Note: If the server on which you are installing FolderMatic is not a member server of the domain, you must use the Computer Management > Local Users and Groups Control Panel to make the domain account part of the local Administrators group. Do not make a new account on the server, use the account you made for Add2Exchange.

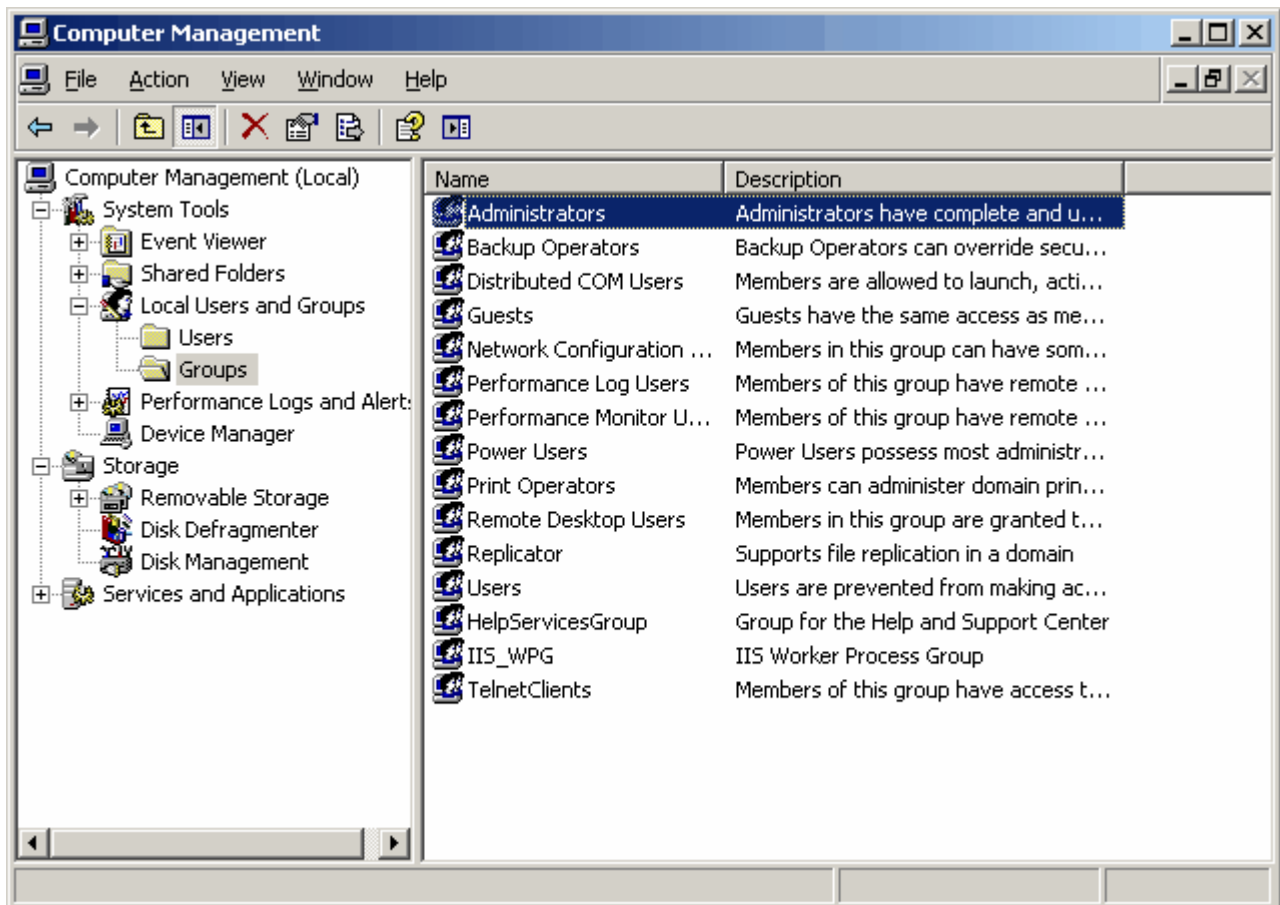
Essential: If FolderMatic is installed on a server other than the Domain Controller or Exchange Server, make sure the FolderMatic Service domain account is part of the local Administrators Group of the server it is doing Cloning on AND the Exchange Server.

Manage "My Computer" from the Desktop



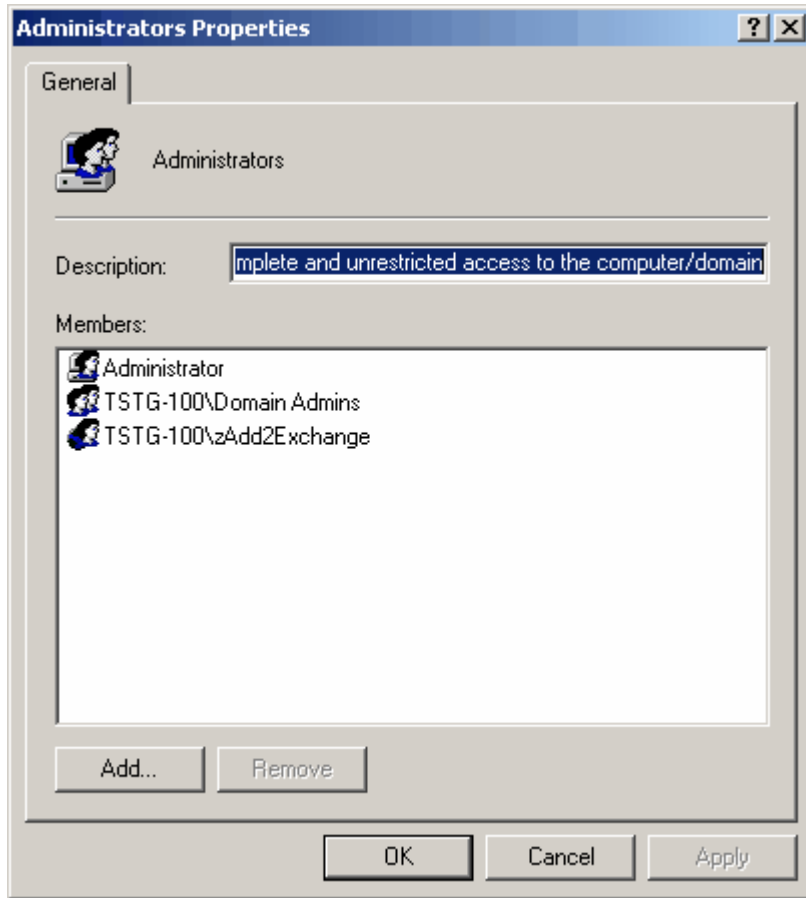
1. On the desktop, right-click *My Computer* and select *Manage*.

Selecting the Administrators Group



2. Expand the *Local Users and Groups* sub tree, select *Groups* and double-click the *Administrators* group.

Adding the Service Account to the local "Administrators" Group



3. Click *Add...* and choose the Service Account to add it to the group. Click *OK* and exit the management console.

11.8 Prerequisite 8: Log off and back on as the Service Account

If you are not logged in as the Service Account, log off the current account and log on as the new Service Account. This is essential and the number one common configuration mistake.

12 Installation of FolderMatic and Upgrade Process Overview

Installation Instructions for both New installations and FolderMatic Upgrades

If you are **upgrading** your existing version of FolderMatic, please make sure all the System Requirements have been met and all updated Preinstall Prerequisites have been completed prior to installation. Please review and certify your system prior to installation: [Step by Step Pre-Installation Instructions](#) and then install over the older version. The FolderMatic upgrade install will automatically uninstall the older version and install the new version over it.

New install Tips:

- This install (or the prerequisites) may require a reboot of the server it is being installed on. Please be aware and schedule installation accordingly.
- Remote Technical Support can handle the entire upgrade for a reasonable fee. To prepare for a remote install, it is best to make recent brick-level backups of the Exchange Stores and registry. Also, do all required Windows and Exchange Service Packs and reboot after they are installed. Also, make sure the directory where FolderMatic is installed is excluded from antivirus scanning. Critical Support Agreements are available at additional cost. Call 800-837-8636 for your Remote Session or go to <http://www.DidItBetter.com/new+remote+support+session.aspx>.

Download the new version and install it. Get the latest software from our Downloads area at www.DidItBetter.com.

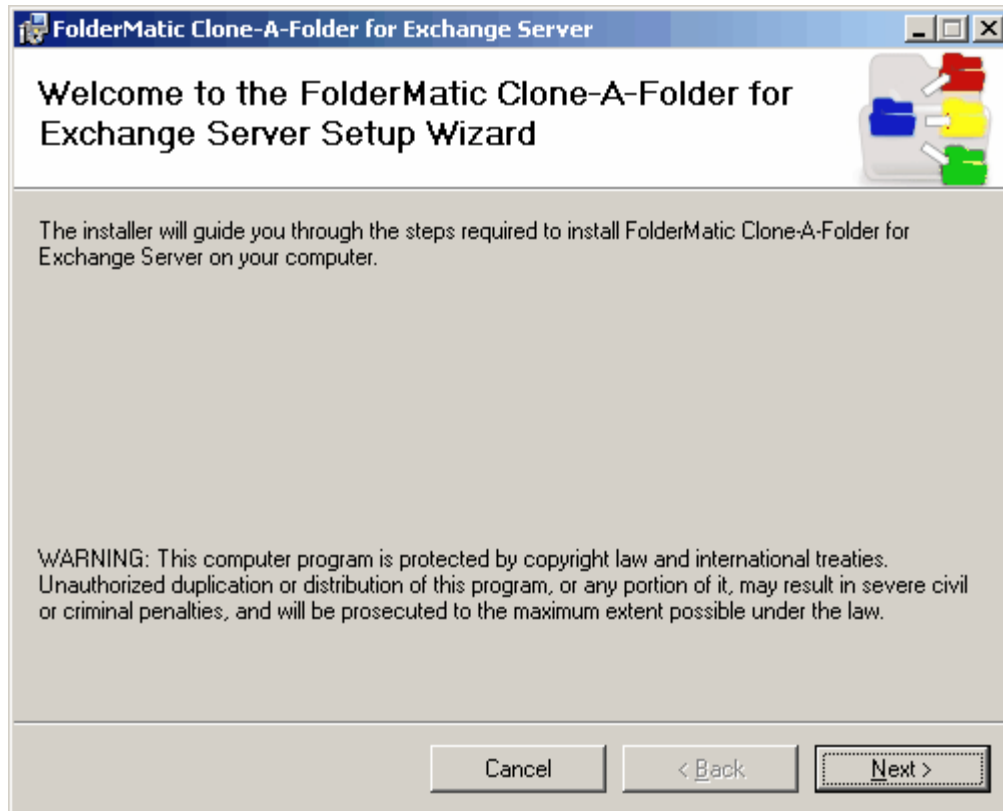
The installation zip file includes the setup program, the latest manual and ExchangeRegistrySecurity.exe that will allow the current user to see the Exchange Security Tab.

GET the NEWEST! If you downloaded more than a few days ago, please stop and make sure you have the latest release and latest manual for hints, tips and additional functions. Open the new manual to this section and continue.

You **MUST** be logged in as the Service Account to install and use FolderMatic.

Run FolderMaticSetup File. Please read the screens and follow the directions.

FolderMatic Setup Wizard

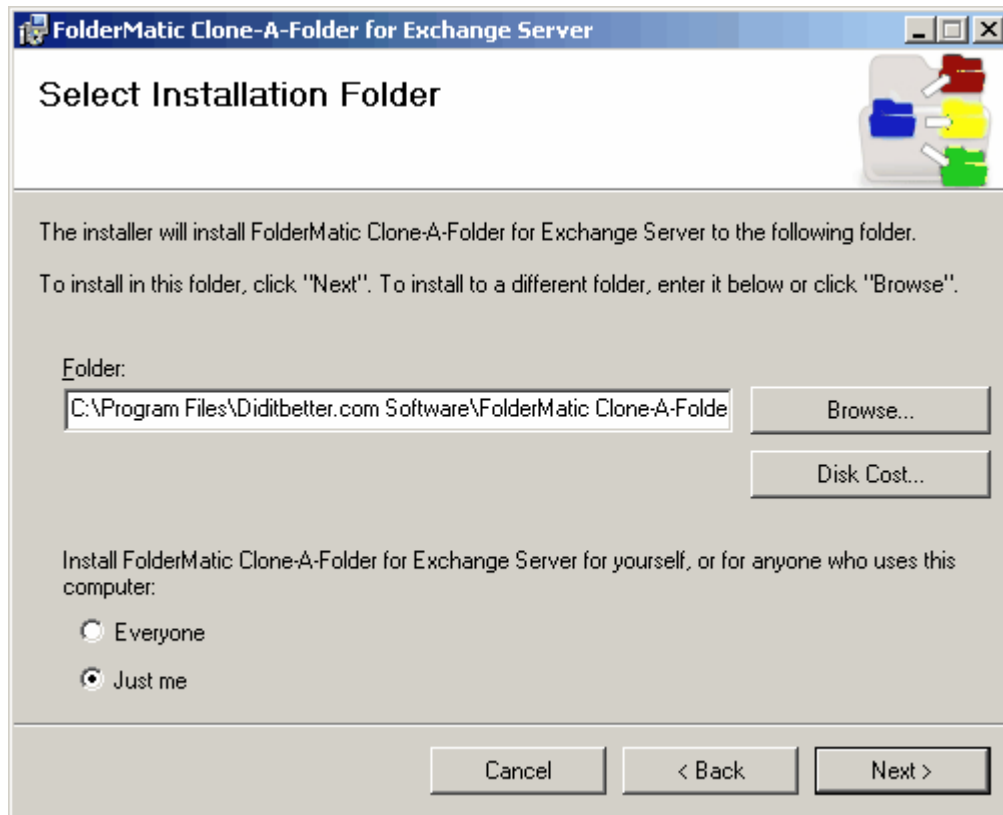


- Click *Next*

License Agreement

- Select *I Agree* to continue with the Installation.

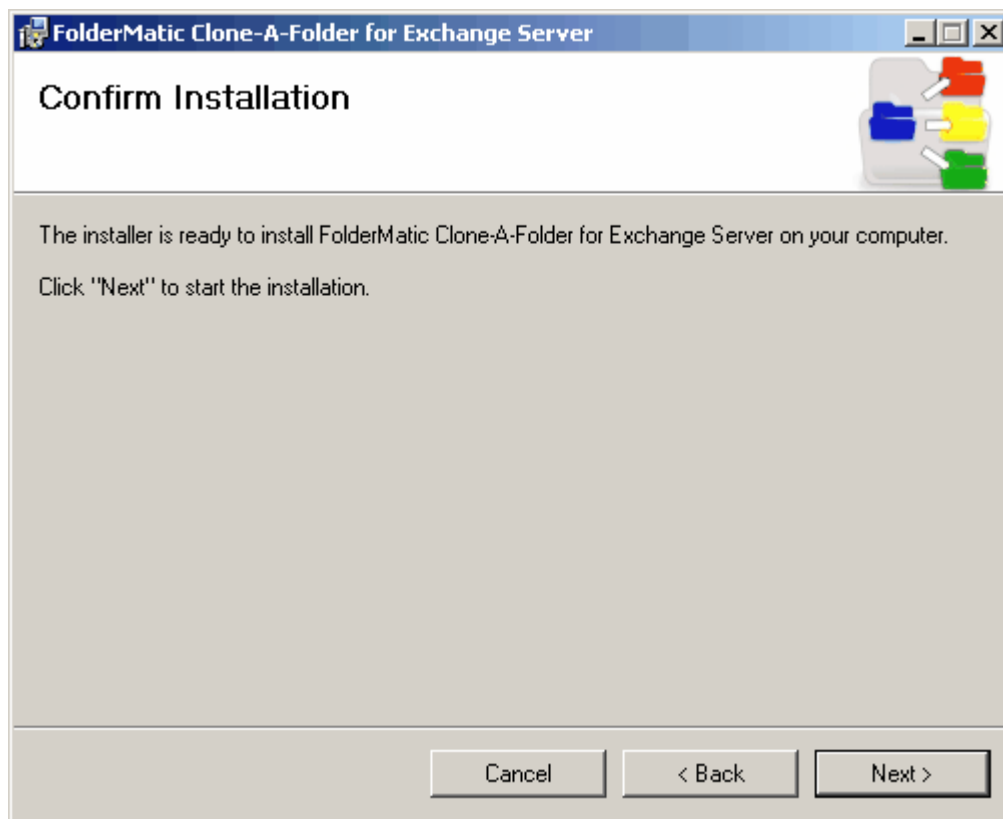
Installation Directory Selection



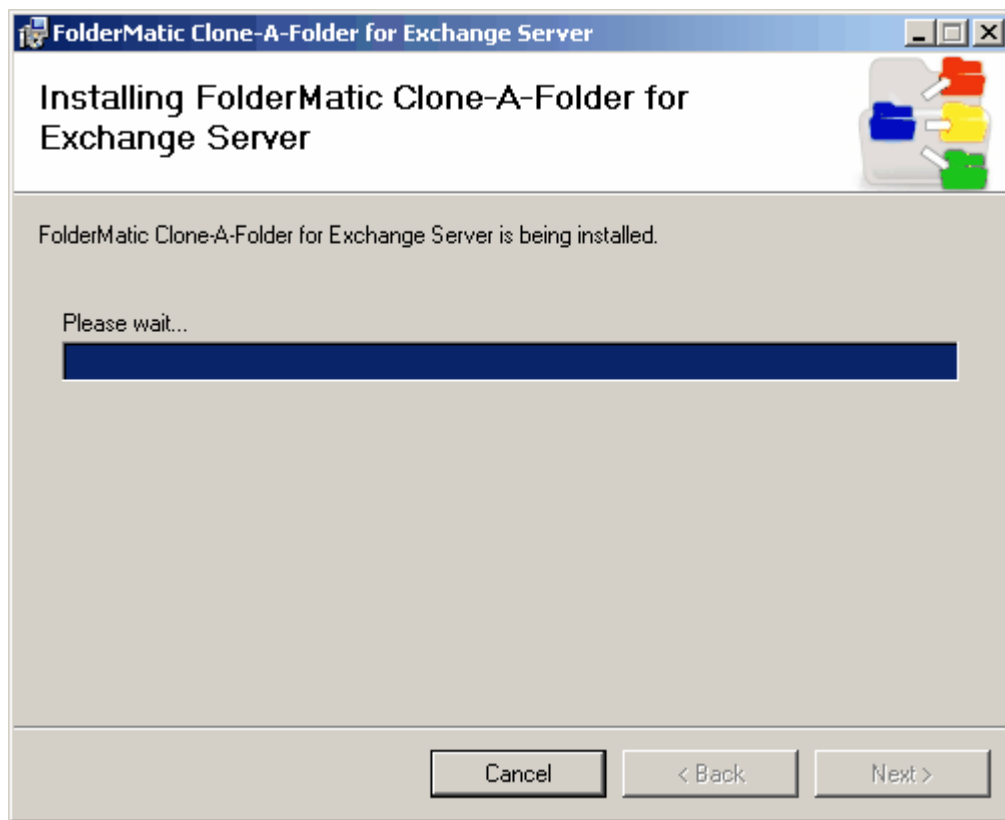
- Select the folder in which FolderMatic will be installed. If possible, we recommend installing to the default location. Make sure you have enough available space to meet the requirements described in the System Requirements section. If you are unsure of your space and the requirements, click *Disk Cost...*

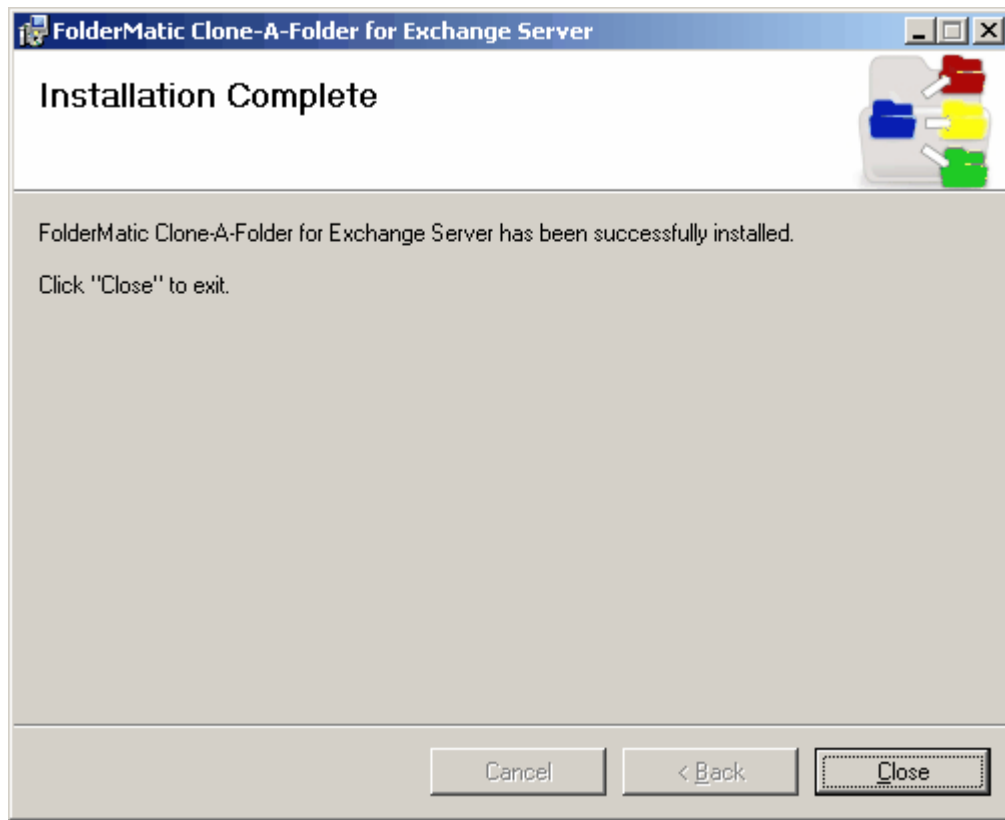
To install FolderMatic in a different folder, enter it in the folder field if you know the exact path or click *Browse...* to install elsewhere.

- Once selected, click *Next >* to continue to the Confirm Installation window.

Confirmation Dialog

- In the Confirm Installation dialog, click *Next >* to start the installation.

Installation Progress Dialog



When the installation has completed, click *Close* to exit.

This completes the installation.

Congratulations! FolderMatic has successfully been installed!

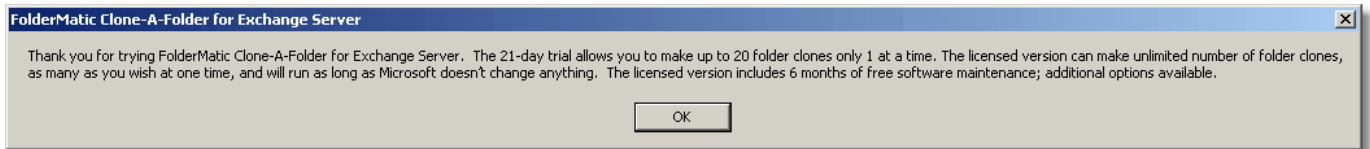
From the desktop, double-click the *FolderMatic Console* icon:

Console Desktop Icon



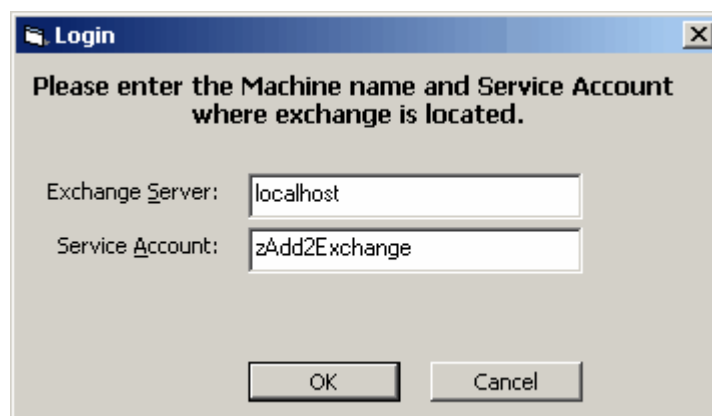
- The trial FolderMatic will make folders for 21 days. It will also only allow you to make 20 folder clones and only 3 at a time. Once licensed, it can make an unlimited number of folder clones as desired at one time.

Trial Dialog



- Click *OK*. When prompted, enter the name of your Exchange server (or *localhost* if FolderMatic is installed on the Exchange Server itself) as well as the Service Account name.

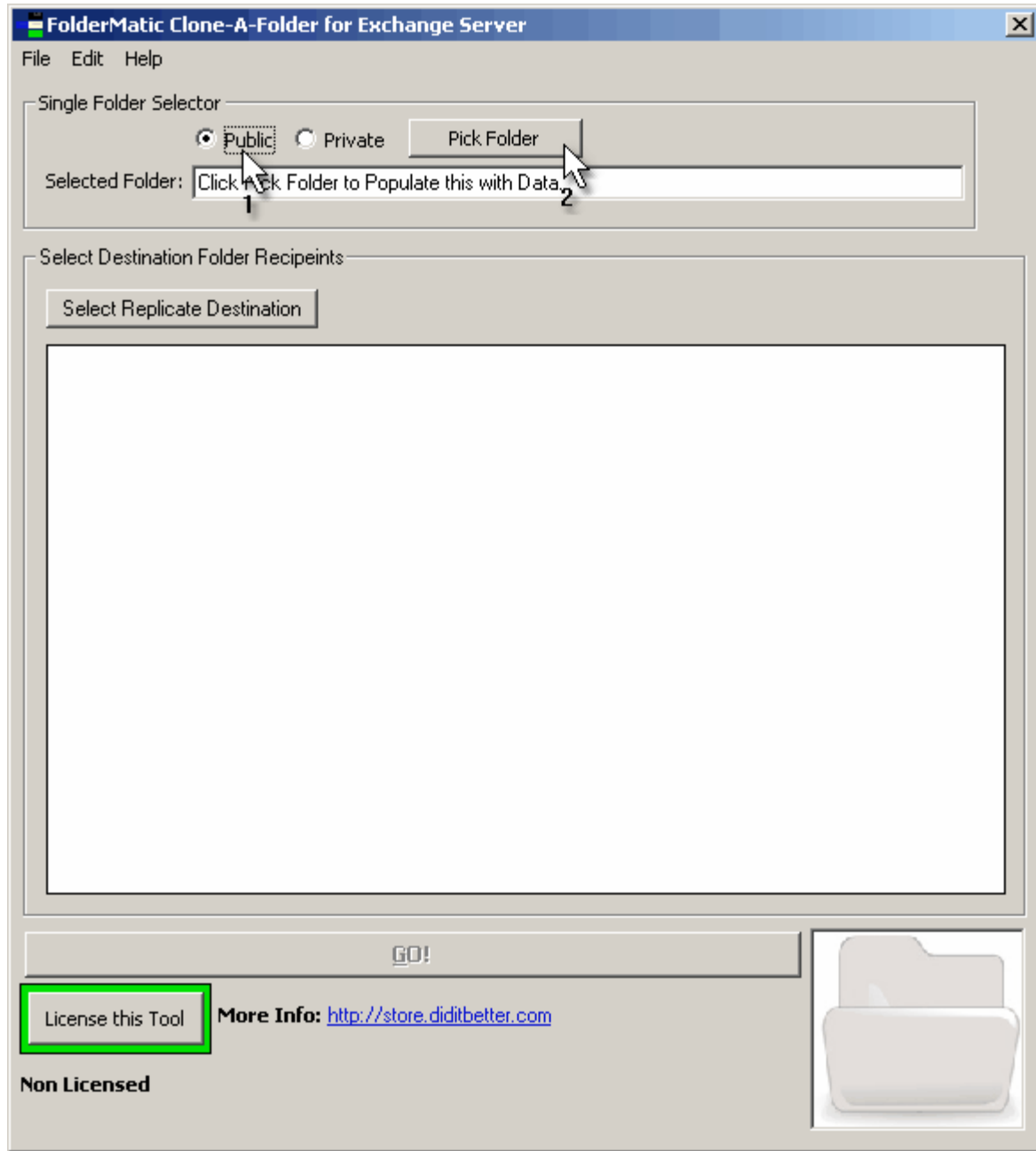
Exchange Server Selection Dialog



- Click *OK*.
- If you are installing FolderMatic for the first time, the Console will open and you can begin configuring Cloning Relationships.

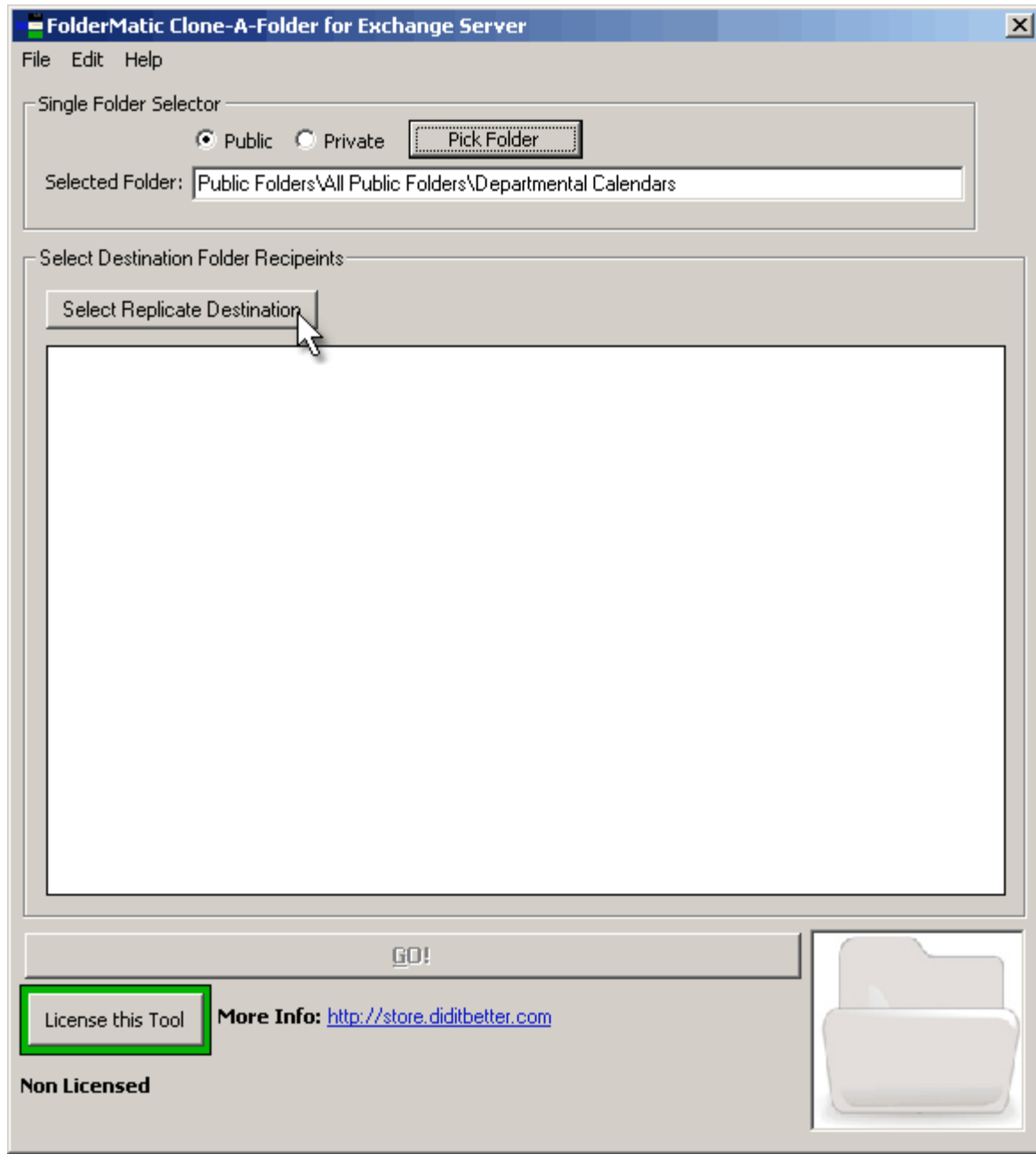
13 Making Folder Cloning Relationships

FolderMatic Console

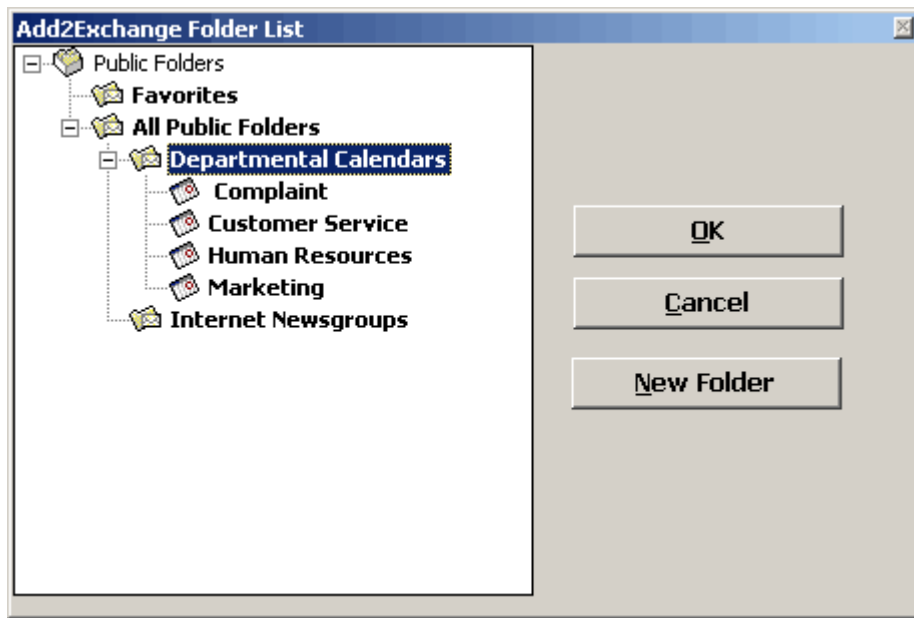


Select or Make Source Folder Tree

- The Select/Make Source Folder Tree is the Source mailbox or public folder to be utilized to make the Template Folder Relationship. The folder to be made does not have to be the default folder of that type and once it is created, the entire folder structure from the root of the mailbox selected will be recopied to the destination(s).



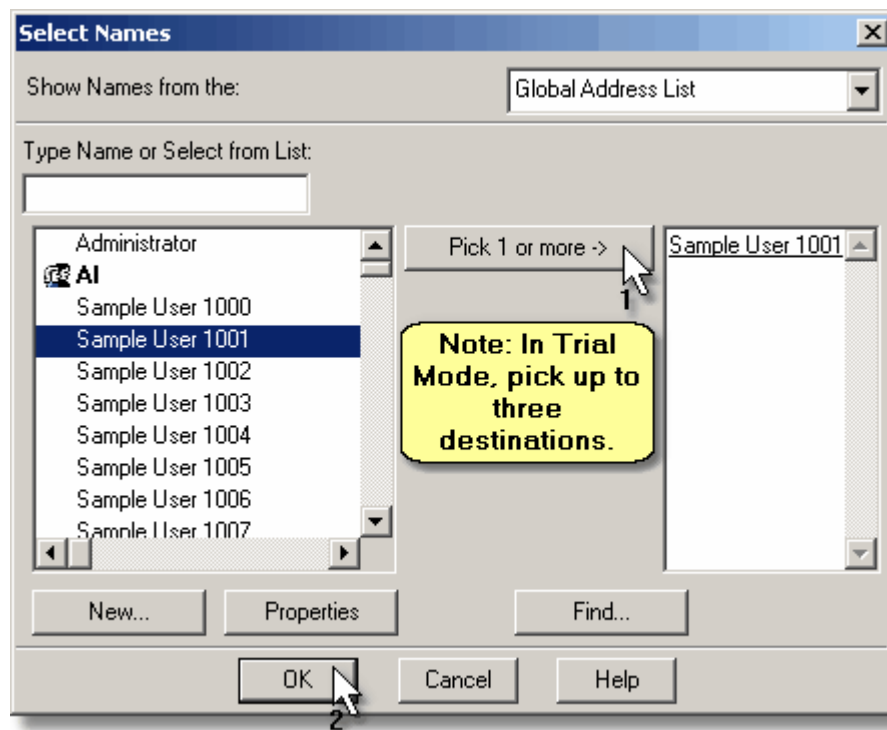
- In our demonstration, we have picked the public folder structure to replicate to a user's mailbox.



- Select the name and the type of folder to be created. Multiple folders can be created at once, and once done, have your cursor on the deepest child folder you want to create and when you select OK, that structure will be transferred to the box. When you select OK, make sure your cursor is on the deepest child of the folder structure. After selecting OK, make sure the folder structure is correctly specified in the Selected Folder box.
- **TIP:** You should not manually edit the Selected Folder box.
- select OK when ready.

Destination Folder List

- Select Destinations to where the folders are to be cloned.



NEW! FolderMatic can now clone folders to distributions lists as well as individual mailboxes. In Trial Mode, folders will only be created in the first three mailboxes of the distribution list.

Common Error Tip: If you get a item that no folders exist of that type, or folders cannot be enumerated, your Service Account may have one of the following: the wrong memberships in Active Directory or the Service Account does not have Ownership to the Private mailbox of the user you are trying to make a Relationship to or from.

To fix the problem, refer to the section *Advanced Users: Checklist of Prerequisites and Installation of Add2Exchange*.

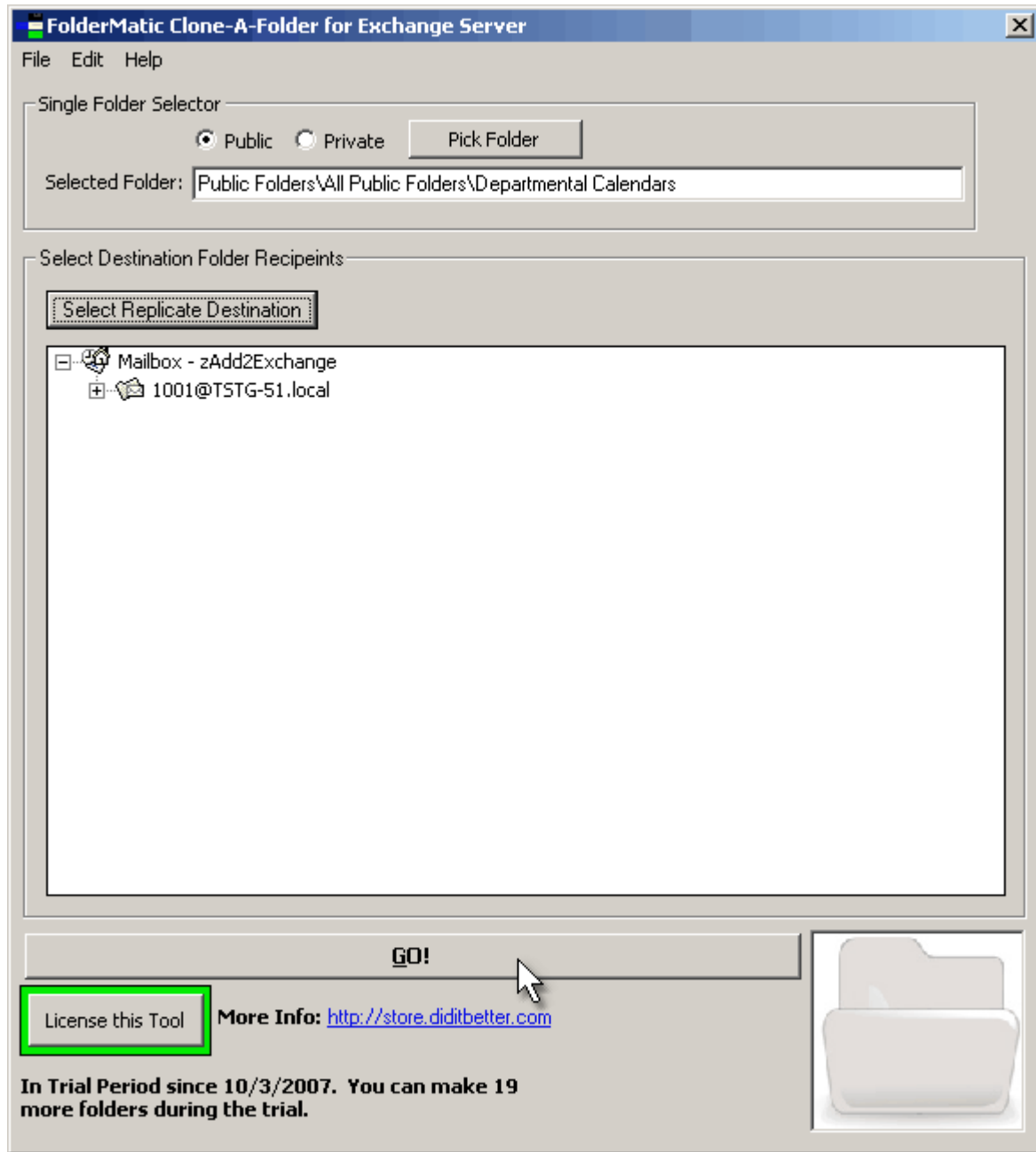
The most likely solution to fix the problem, go into Active Directory for Users and Computers and find the user, right-click, go to Properties, Exchange Advanced, and Mailbox Rights and give the Service Account Ownership of that user's mailbox. This can happen if your Exchange Server does not have inheritance or has special express Deny permissions.

Common Error Tip: If you get folders do not exist for the type of Relationship while making a Public-to-Private Relationship and no Public folders are enumerated, go to Exchange System Manager, drill down to the Public folder you are synchronizing to or from, right-click, go to Properties, and Permissions, and in Client Permissions give Owner and Folder Contact status to the Service Account. If you made the folder you are an "Owner" and can give these required permissions from Outlook. Right click the folder and give the Service Account Client Ownership and make sure to check the box that says "Folder Contact" and then apply. You can then remake the relationship in the FolderMatic Console.

Troubleshooting: If there are no folders showing up, then Service Account permissions are set incorrectly, the access to the user's mailbox has been specified incompletely, or CDO cannot evaluate between two users with similar names in their organization. See the Technical Bulletin named *Cannot find any folders on making a new*

Relationship.

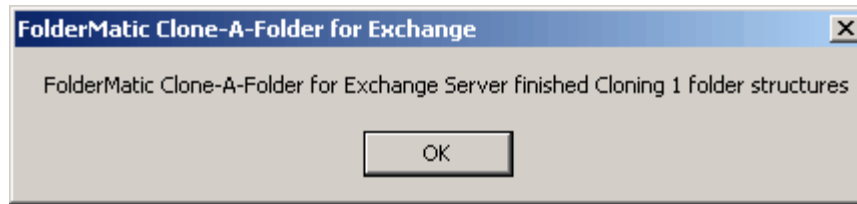
- When selection is complete, select *OK*. Remember, in the Trial you can do only three destinations at a time and make only 20 folders during the 21 day trial.

Folder Selection Dialog

- When you are ready to create the Clone folders, select *GO!*
- If you are in trial, or you pick more than three destinations, you will get the following screen. If FolderMatic is not in trial it will allow as many folder destination mailboxes as desired and will populate the screen with each

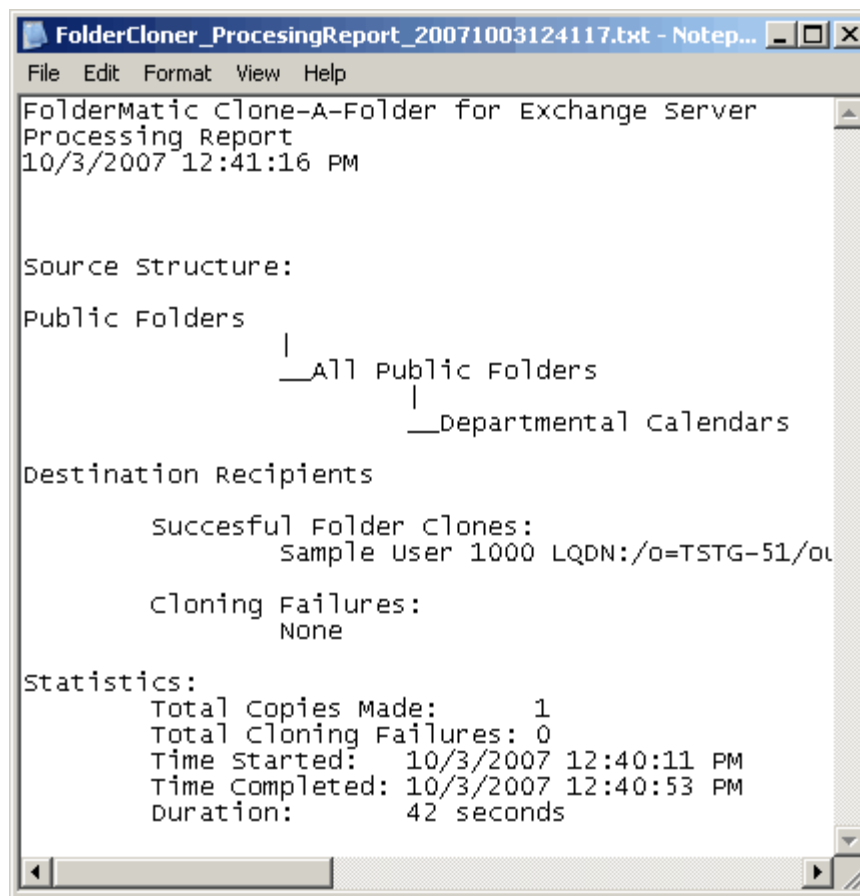
mailbox selected.

Progress Dialog



- The results are listed in a text file that is automatically named and dated and opened.

Cloning Report



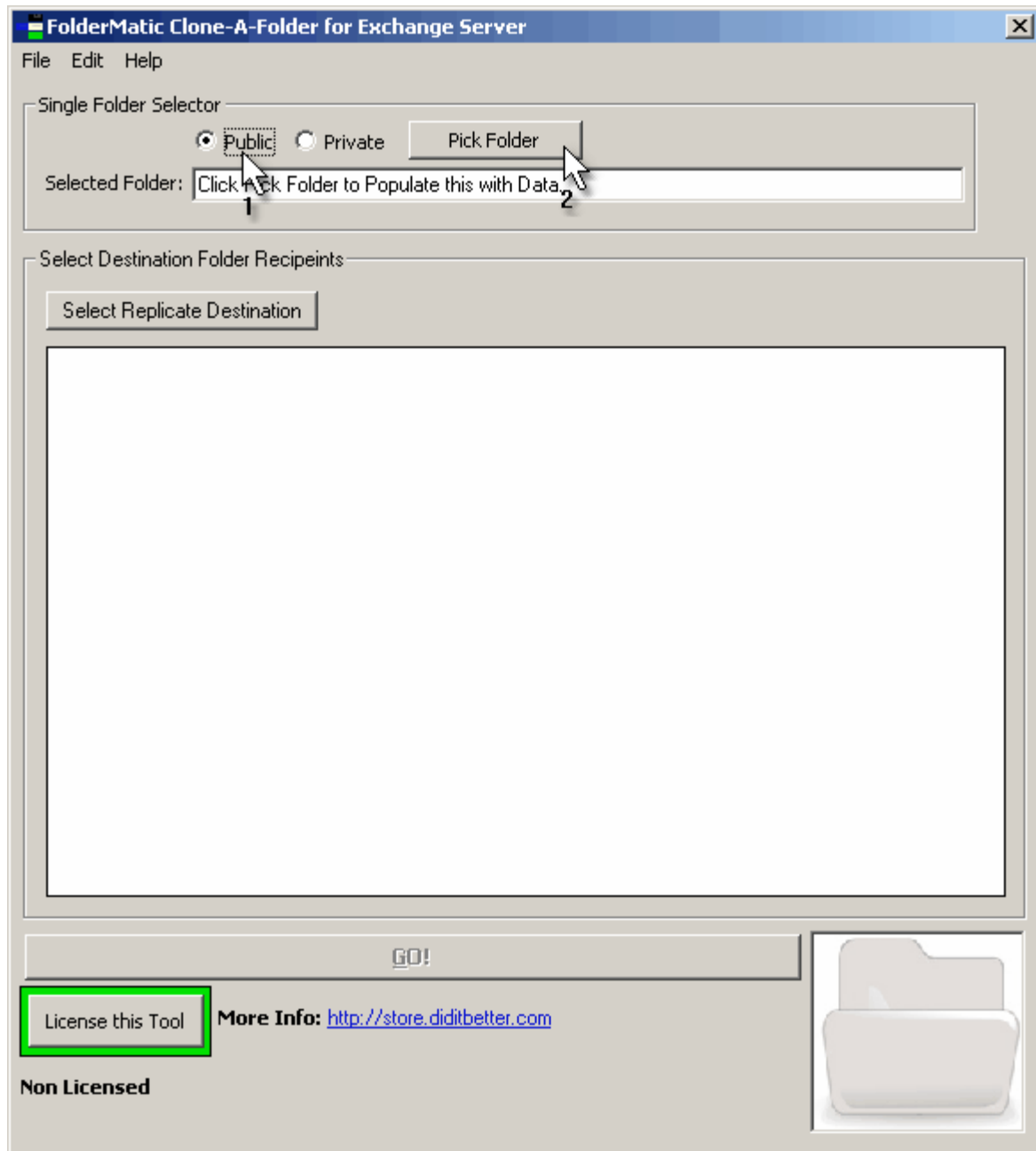
It is that easy! If you have any suggestions on usability, please send to ai@diditbetter.com.

14 Licensing FolderMatic

When you have or wish to purchase and you want to send the information to us to generate your key, log on as the Service Account, open the Console and click on the License button. The registration screen will attempt to collect some information about you, the end user and the reseller if it is applicable. For us to provide exceptional support, please fill out all the information.

If you are purchasing during the trial or after the trial, go to the FolderMatic Console, and select *License this Tool*

.

Folder Selection Dialog

- Purchase your FolderMatic license today at our online store at <http://store.DidItBetter.com/>. Reinstalling FolderMatic will not extend the trial.

Licensing Dialog

Didibetter.com License - FolderMatic Clone-A-Folder for Exchange Server

Thank you for trying FolderMatic Clone-A-Folder for Exchange Server!
 This is a Trial Version Not Initialized
 To purchase the FolderMatic Clone-A-Folder for Exchange Server, please follow the instructions below

STEP 1:

STEP 2:

Please press the "Send License" button above to enter and send your licensing information to us

License Info:

STEP 3: After we receive your order and license request, we will email you a license key generated from your "License Info". Paste the entire License Key, including the dashes, into "Box #1" and select "OK" to license your product.

License Key we sent you: - - - -
 Box #1

DidItBetter.com Software
 4803 George Road
 Suite 400
 Tampa FL USA 33634
 USA Sales 800 837 8636
 International Sales 001 813 977 5739
 Support or Other Inquiries 813 977 5739

www.DidITBetter.com
 Build: 2.1.0

- **Step 1:** If you have not already purchased through your account representative, clicking *Purchase* goes directly online to our online store where you can buy the program using a MasterCard, American Express VISA or Discover. If you have purchased already, skip to Step 2. From our website you may also download the order form, which requires Adobe Acrobat Reader, to fill out and fax to 813.972.7986. You may also call 813.977.5739 and a member of the DidItBetter team will take care of you.
- **Step 2:** Click the *Send License Address To Register@DidItBetter.com* button to enter your registration information. At the end of this process, Add2Exchange will send an automated email to DidItBetter.com with the information provided in the following screens:

Registration Dialog

End User License Registration * Required

I am the

End User

Authorized Diditbetter.com Software Reseller

Independent IT Consultant working for the End User

Employee of the End User

End User Information | Authorized Reseller Information

Can we contact the End User?: Yes No

End User Company: * Pick the type of user you are in the left side

End User Name: * Fill out both tabs for all required fields

End User Email: *

Phone Number: * Ext. Country Code:

End User Address 1:

End User Address 2:

City, State, PostalCD:

Diditbetter.com Sales Rep:

Licensing What? *

Accept Cancel

If you are purchasing and you are the licensed end-user, fill out the information as required and the license key will be sent directly to you. If you are any other kind of user as listed in the "I am the.." section, you will be asked for both your and the end user's information.

In these cases, the End User information box applies to the actual purchaser of the product (typically a billing or management contact) and this box refers to you, the installer. If you check the *Send License Information to this Address* box, you will receive an email with the same information supplied to the End User.

Select the option(s) you are purchasing, starting with FolderMatic itself. Then select your Software Maintenance period where you get free upgrades.

Select the options that apply to you, then click *Add to My License Selection Below*. Your options will be saved in the License Selection box.

We recommend that you extend your basic Software Maintenance plan for savings on future versions of Add2Exchange. Doing so makes sure you both get access to valuable new features as well as future-proof your installation against the ever-changing requirements of complex environments such as Microsoft Windows and Exchange Server.

Your FolderMatic license key will be generated from information specific to your domain, Exchange Organization, Server and Service Account name. For this reason, you should only complete the registration under the account

that will serve as the long-term Service Account and that you are not planning on doing server migration in the near future. Once the license key is set, if any of these things change, such as a domain rename, you will require a new key. There is a nominal administration fee for such changes.

Once you have entered in all your information and selected the product to license, select *OK*.

License keys typically take one business day to be issued, but please allow up to three business days. If you are closer than that to your trial expiration, contact your sales representative for expedited the process.

Licensing Dialog

Didibetter.com License - FolderMatic Clone-A-Folder for Exchange Server

Thank you for trying FolderMatic Clone-A-Folder for Exchange Server!
This is a Trial Version Not Initialized
To purchase the FolderMatic Clone-A-Folder for Exchange Server, please follow the instructions below

STEP 1:

STEP 2:

Please press the "Send License" button above to enter and send your licensing information to us

License Info:

STEP 3: After we receive your order and license request, we will email you a license key generated from your "License Info". Paste the entire License Key, including the dashes, into "Box #1" and select "OK" to license your product.

License Key we sent you: - - - -

Box #1

DidItBetter.com Software
4803 George Road
Suite 400
Tampa FL USA 33634
USA Sales 800 837 8636
International Sales 001 813 977 5739
Support or Other Inquiries 813 977 5739

www.DidITBetter.com
Build: 2.1.0

Step 3: Once you purchase and receive the key by return email, copy and paste the entire key (including dashes) in the field "Box #1" in Step 3. Click *OK*. and the program will thank you for your purchase.

When you return to the Console, you will see the new key information along with the Expiration date for your

Software Maintenance. This expiration does not apply to your license, only the Software Maintenance associated with it. This means you do not need to be concerned about Add2Exchange functioning after that date. It will. You will simply no longer have access to FREE Add2Exchange updates, enhancements or fixes for Add2Exchange and install them for FREE after that date.

Upgrading after Trial or Software Maintenance Expiration

You CAN upgrade your current installation of Add2Exchange after your Software Maintenance expires, but the program will not make folder clones until you pay for the new upgrade and receive a new license. It is highly recommended not to downgrade your installation to previous installations as it may not work. For uninterrupted operation, if you want the updated version of FolderMatic or are extending your Software Maintenance, please contact your sales representative prior to the upgrade or expiration of your Software Maintenance for incentives to extend your Software Maintenance.

Again, the best value we can provide is to purchase extended Software Maintenance with your initial license or extend it BEFORE it expires.

15 Troubleshooting

Installation Issues	DidItBetter.com Web Technical Support
Hot Tips	Hot Tips for Troubleshooting
Quick Reference resources	Quick Reference resources
FAQs	http://www.DidItBetter.com/FAQ.aspx
Technical Bulletins and Supporting Files	http://www.DidItBetter.com/Add2Exchange_Bulletins.aspx
Documentation	http://www.DidItBetter.com/Documentation.aspx
To submit a Support Request	http://www.DidItBetter.com/SupportRequest.aspx

15.1 Hot Tips for Troubleshooting

- FolderMatic only works with Server Side Mailboxes, and not personal mailbox folders (not PST files).
- Make sure you are logged in as the Service Account to add or change Cloning Relationships.
- Please make sure you have ALL hot fixes and updates applied to your Exchange Server and .Net Framework. It is also helpful to have your Exchange Server in the best possible configuration. Microsoft provides a tool for proper Exchange Configuration - Run Microsoft's Exchange Server Best Practices tool found at: <http://support.microsoft.com/default.aspx?scid=kb;en-us;892213>
- The folders created in FolderMatic can be synchronized to a user's mobile device if it is included in the Send/Receive Settings of ActiveSync, Intellisync, Windows Mobile or whatever other software you use to get information from Outlook into the mobile device. Often these new folders that are created must be manually added as inclusions to the Send/Receive Settings in Outlook or your synchronization software. If they are not appearing on your mobile device, check there.
- Against better advice, some users have installed FolderMatic on a machine with Outlook and the optional CDO component (Add/Remove Outlook Settings) combined with a third party product called "Express Click Yes" or "Mapilabs" to eliminate the Outlook security warnings. This type of installation is not recommended, but it has been tested and it works. It is not recommended since you are installing a program that will circumvent a security feature, which is never wise.

15.2 Quick Reference Resources

Solution information, pricing, fully functional trial versions, support request form, trial user evaluation and end-user solution evaluation forms, FAQs, Technical Bulletins, and updates are available on our website.

You can also purchase your license online (click on the Purchase > Buy Now link). Visit our website: www.DidItBetter.com

16 Appendix A: Exchange 2007 Permissions Setup

As of September 1, 2007, Add2Exchange and FolderMatic has been installed and tested and approved in an Exchange 2007 environment and has gained acceptance. DidItBetter Software provides the following information on usage with Exchange 2007.

Tip: We have many customers who have adopted Exchange 2007 and have installed our products in that environment with total success. Our corporate policy has still been to wait since although Exchange 2007 has many improved features, it does not have at least the same features as 2003. Until Microsoft makes some functionality enhancements, it has been our recommendations that since 2003 is no longer available - we suggest users buy the licenses to Exchange 2007 and downgrade the media and install 2003. Talk to your software representative for more details.

Usage of the Add2Exchange and FolderMatic Console application with Exchange 2007 is unchanged. Exchange 2007 only affects the configuration of permissions due to the new Exchange security model and the new user interface of Exchange itself (Exchange Management Console and PowerShell). The following are considerations and known issues for Exchange 2007:

Issue	Description
Upgrading Existing Relationships	This concern is not applicable. Once a relationship has been made and cloned to other users, it is available in Exchange 2000-2007.
Exchange Server Moves	The Exchange server on an existing FolderMatic installation cannot be changed to a new server. Contact your sales representative to coordinate DidItBetter Technical Support for assistance.
Public Folder Support	Public Folders are not necessarily installed on Exchange 2007 installations but can be if it is an in place upgrade or added separately. Public folders are not a concern and are not required for normal FolderMatic operation but are if the folders to be used as a template are Public Folders.
Permissions	As long as the proper Permissions were given as specified to the ServiceSecurityGroup, and those folder permissions are inherited, then permissions are not an issue unless someone has changed the permissions since then. Changing the permission in the 2007 security model require a combination of Exchange Management Console and Exchange Management Shell configuration.

Exchange Server Moves

The following is a table of the appropriate installation scenarios with regard to upgrades of existing FolderMatic installations:

Location	Exchange 2007 on New Server
----------	-----------------------------

FolderMatic Does Not Change Location (Exchange Server or independent Cloning Server)	Change the Netbios name of the old Exchange Server to the new Exchange Server in the registry under local machine, software, Open Door Software and FolderMatic. Otherwise Contact DidItBetter for support at 800-837-8636
FolderMatic on New Server or in new location (Exchange Server or independent Cloning Server)	Once Add2Exchange is installed, it can not just be uninstalled and moved to a new location. Unlike Add2Exchange, FolderMatic can just be uninstalled and reinstall to a new location. If installed to a new server, just make sure the Service Account is added to the new machines local Administrators group.

Public Folders Support

Exchange 2007 attempts to do away with the Public Folder infrastructure by default on a new install, while upgrades from older versions of Exchange maintain Public Folders. For this reason, you do not need to be concerned if you are upgrading Exchange from an older version. However, Outlook 2003 as well as Add2Exchange both require Public Folder infrastructure to operate. On a new install, you **must** respond affirmatively that you have Outlook 2003 clients when asked during the install in order for Public Folders to be installed, allowing Add2Exchange to operate. Since FolderMatic does not require Public folders but can utilize them as a source folder structure, the changing permissions of public folders does not matter to the proper operation of FolderMatic unless you are copying from Public folders.

Permissions

Important: Because of the nature of synchronization across multiple mailboxes and the security model of Exchange 2007, the Service Account must be given Organizational-level administration permissions. This level of permissions is very powerful, so take prudent security measures to protect this account and follow all Microsoft recommendations for security best practices.

Prior to Exchange 2007, the Service Account could not be a part of the official Exchange Active Directory groups. With 2007, the security model has changed so that the Service Account *must* now be given the Exchange Organization Administrators role. This is done through the Exchange Management Console. In addition, special permissions must be given to the Service Account through the Exchange Management Shell (PowerShell).

Integration with Active Directory Users and Computers

Exchange 2007 no longer installs an Active Directory Users and Computers link as did previous versions of Exchange. Exchange Management Console now performs many of the functions formerly performed in the Active Directory Users and Computers console, such as user account creation and display of Exchange configurations on user accounts. While you can still perform many of these functions from the existing Active Directory Users and Computers console, it is recommended that you use the Exchange Management Console as much as possible as this is the approach used in DidItBetter Software's documentation.

Configuration of Service Account Permissions

These steps presume you have already begun the step-by-step instructions for installing Add2Exchange. If you have not already created the Security Group, begin with the section **Prerequisite 1: Create a Security Group**.

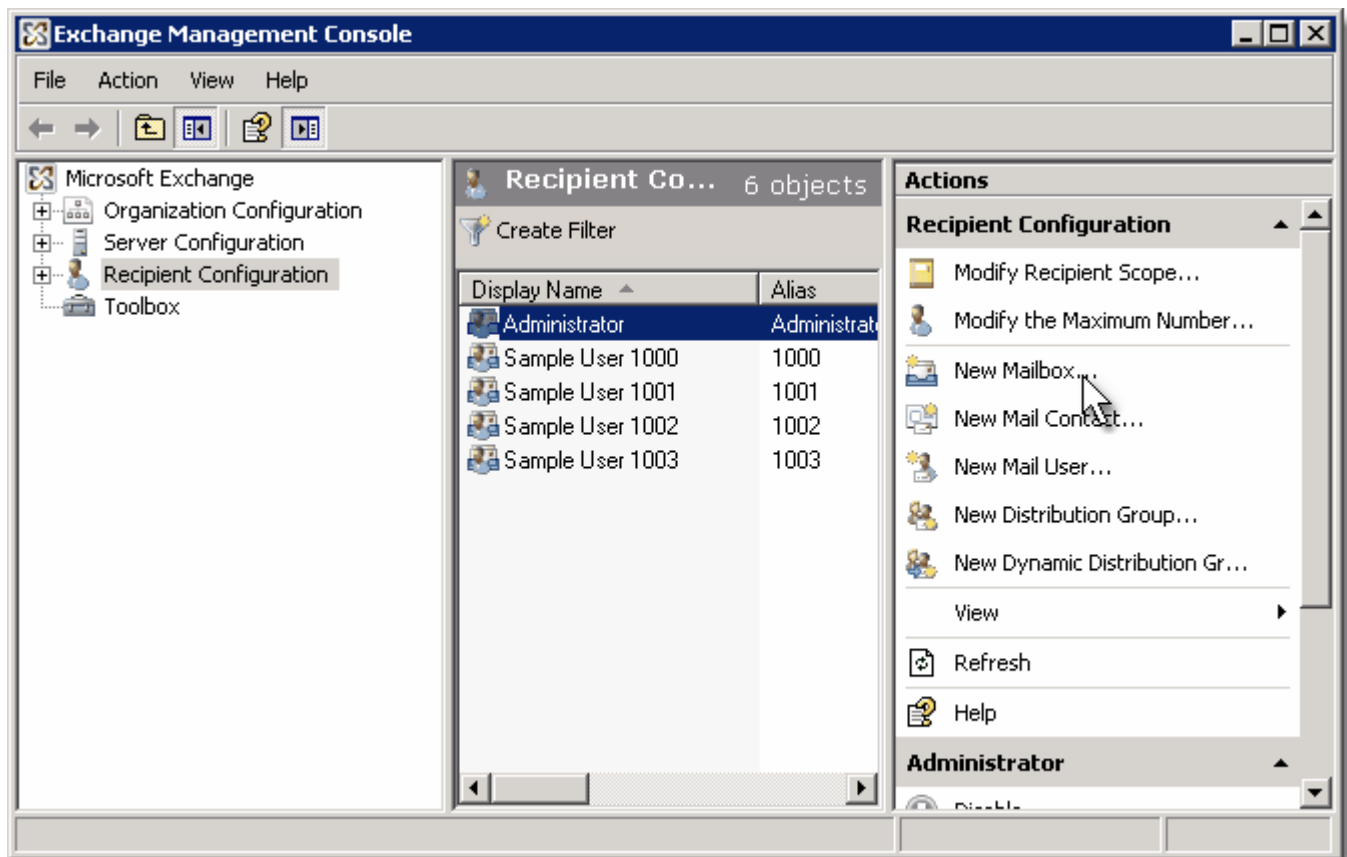
You will be directed to these instructions at the appropriate step.

If you are upgrading your Exchange infrastructure and have an existing Service Account, see the section *Removing Old Service Account Permissions*, then continue with these instructions from this point:

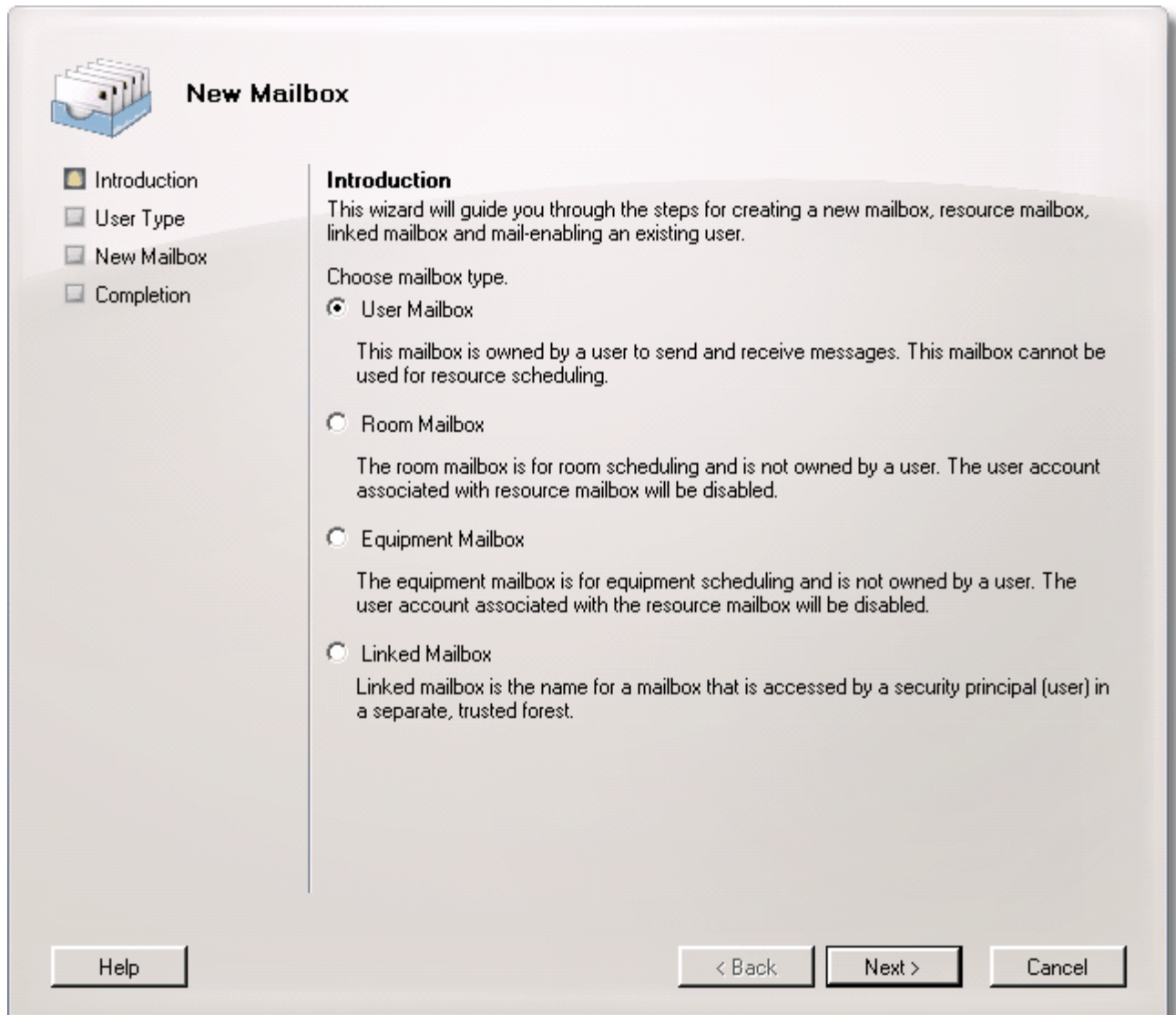
Giving the Service Account the Organizational Administrator Role.

1. Log onto the *Administrator* account on a system with the Exchange Management Console.
2. Open Exchange Management Console.
3. Select the *Recipient Configuration* list item in the left-hand pane.

Recipient Configuration in Exchange Management Console



4. Click *New Mailbox...*

New Mailbox Dialog

New Mailbox

Introduction
 User Type
 New Mailbox
 Completion

Introduction
This wizard will guide you through the steps for creating a new mailbox, resource mailbox, linked mailbox and mail-enabling an existing user.

Choose mailbox type.

User Mailbox
This mailbox is owned by a user to send and receive messages. This mailbox cannot be used for resource scheduling.

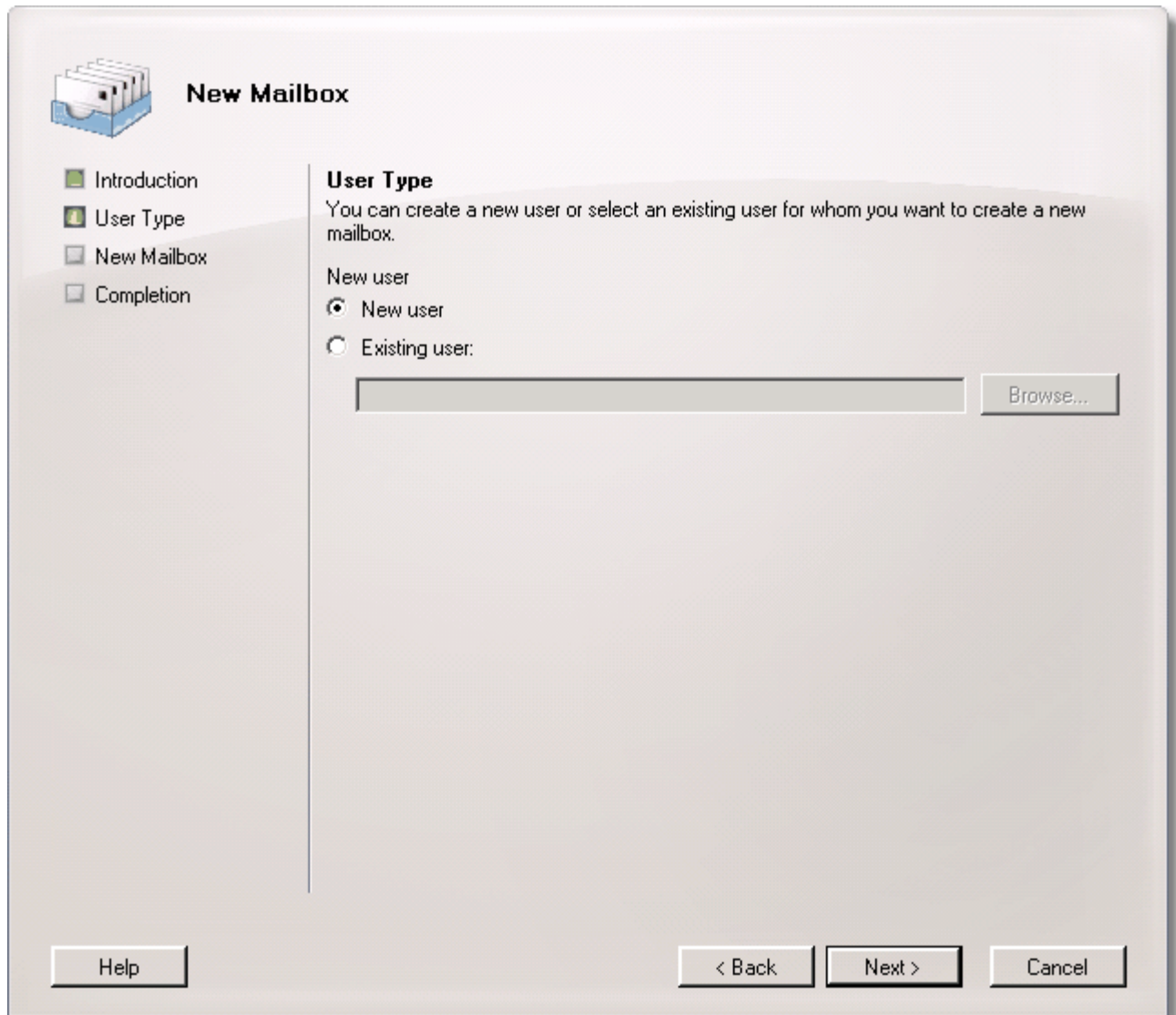
Room Mailbox
The room mailbox is for room scheduling and is not owned by a user. The user account associated with resource mailbox will be disabled.

Equipment Mailbox
The equipment mailbox is for equipment scheduling and is not owned by a user. The user account associated with the resource mailbox will be disabled.

Linked Mailbox
Linked mailbox is the name for a mailbox that is accessed by a security principal (user) in a separate, trusted forest.

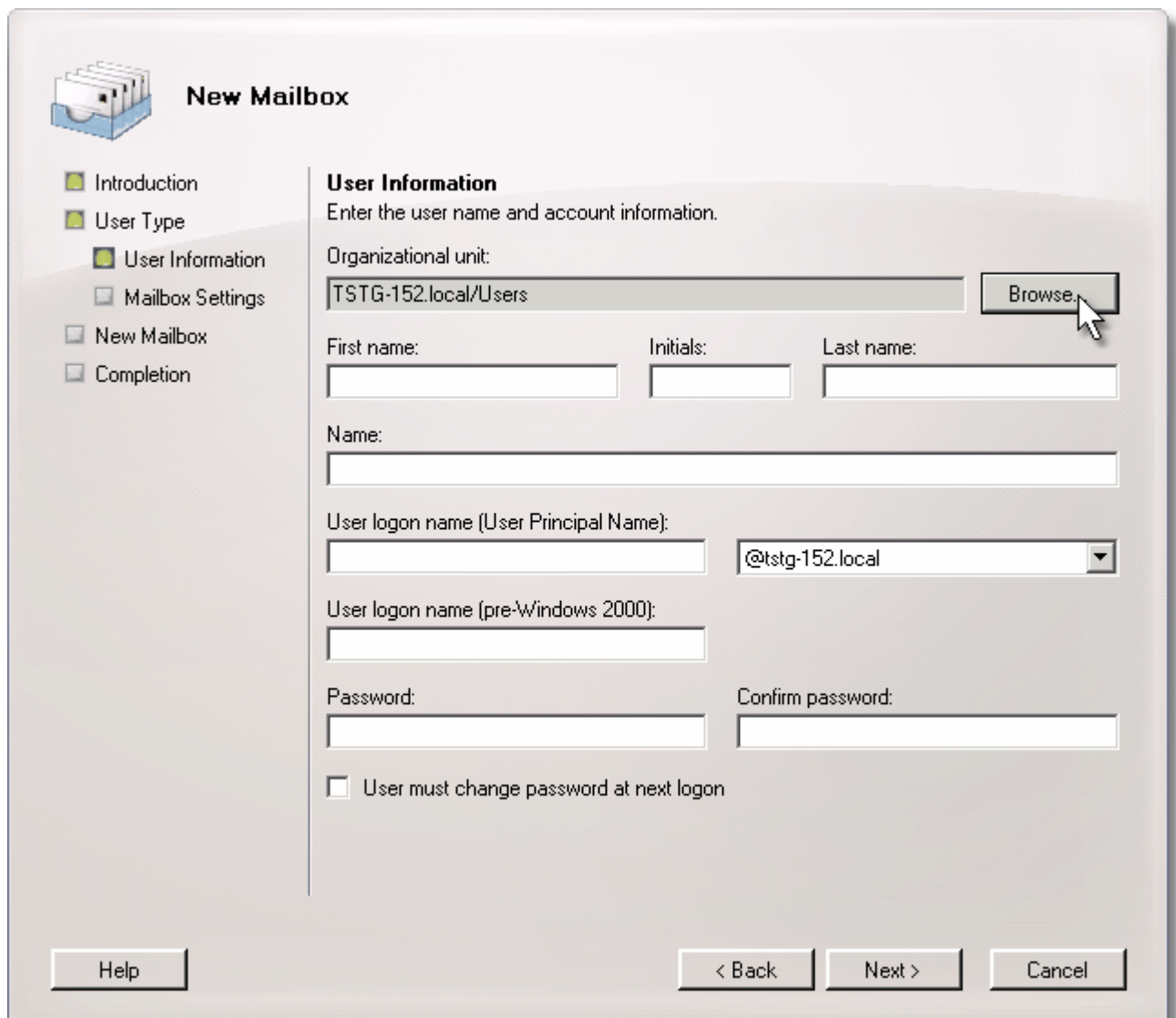
Help < Back Next > Cancel

5. Make sure *User Mailbox* is selected and click *Next >*.

User Type Dialog

6. Make sure *New User* is selected and click *Next >*.

User Information Dialog



The screenshot shows the 'New Mailbox' wizard in Exchange 2007. The wizard is titled 'New Mailbox' and has a navigation pane on the left with the following steps: Introduction, User Type, User Information (selected), Mailbox Settings, New Mailbox, and Completion. The main area is titled 'User Information' and contains the following fields and controls:

- Organizational unit:** A text box containing 'TSTG-152.local/Users' and a 'Browse...' button to its right.
- First name:** An empty text box.
- Initials:** An empty text box.
- Last name:** An empty text box.
- Name:** An empty text box.
- User logon name (User Principal Name):** A text box containing '@tstg-152.local' and a dropdown menu showing '@tstg-152.local'.
- User logon name (pre-Windows 2000):** An empty text box.
- Password:** An empty text box.
- Confirm password:** An empty text box.
- User must change password at next logon

At the bottom of the wizard, there are four buttons: 'Help', '< Back', 'Next >', and 'Cancel'.

7. If you need to select an Organizational Unit or Active Directory container other than the default *Users*, do so now. You may click *Browse...* to select the Active Directory Container from a list.

User Information Dialog

New Mailbox

Introduction
 User Type
 User Information
 Mailbox Settings
 New Mailbox
 Completion

User Information
Enter the user name and account information.

Organizational unit:
TSTG-152.local/Users

First name: zAdd2Exchange
Initials:
Last name:

**These should match.
Do NOT leave Name blank.**

Name: zAdd2Exchange

User logon name (User Principal Name):
zAdd2Exchange @tstg-152.local

User logon name (pre-Windows 2000):
zAdd2Exchange

Password: Confirm password:

User must change password at next logon

8. Enter the account information as shown, or choose your own name for the Service Account. The account will be a full Exchange Organizational Administrator, so you may want to use your standard administrative password for easy recollection. Click *Next >* when ready.

Mailbox Settings Dialog

New Mailbox

Introduction
User Type
User Information
Mailbox Settings
New Mailbox
Completion

Mailbox Settings
Enter the alias for the mailbox user, and then select the mailbox location and policy settings.

Alias:
zAdd2Exchange

Server:
TESTING-152

Storage group:
First Storage Group

Mailbox database:
Mailbox Database

Managed folder mailbox policy:
Browse...

Exchange ActiveSync mailbox policy:
Browse...

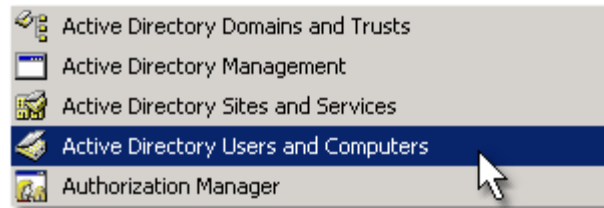
Messaging records management is a premium feature and requires an Exchange Enterprise Client Access License (CAL).

Help < Back Next > Cancel

9. Leave the Alias setting at the default and, if there are multiple storage groups or mailbox databases, choose the appropriate one. Click *Next >*.

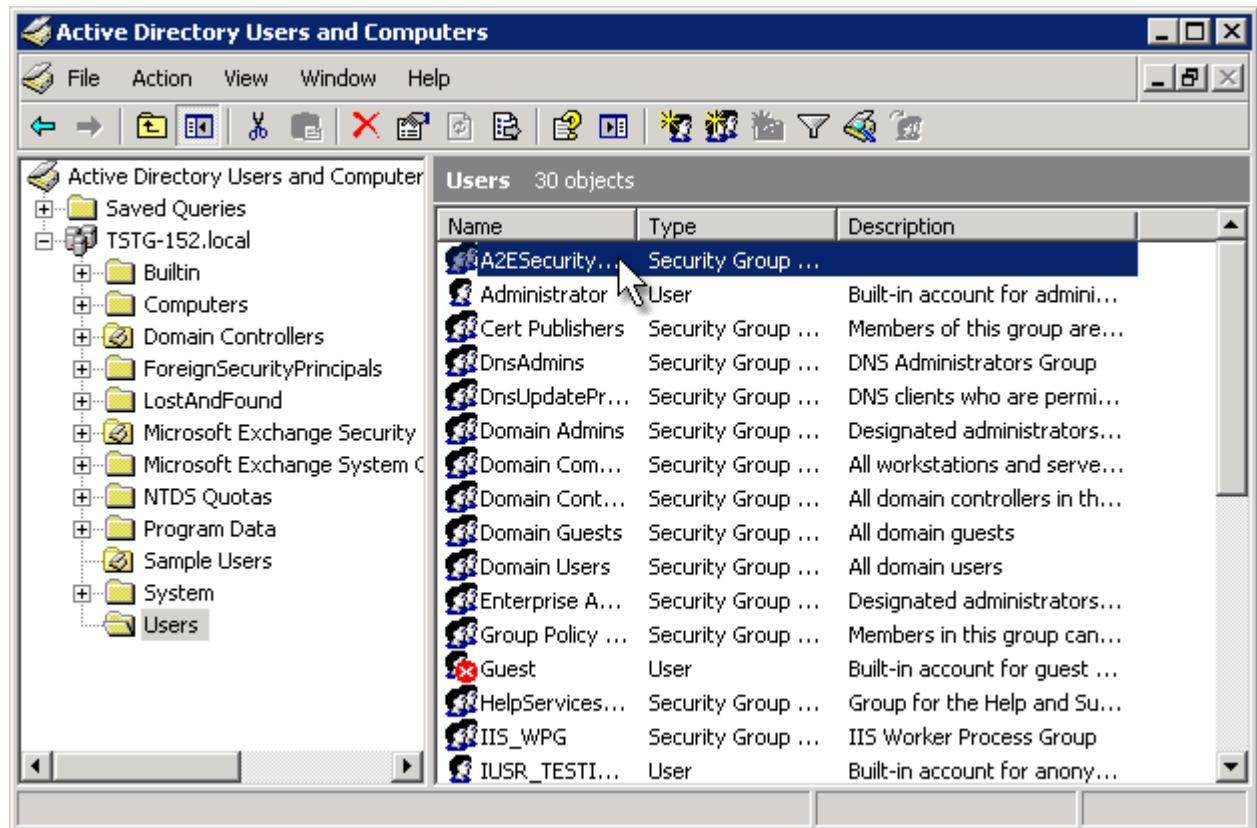
10. At the *New Mailbox* dialog, click *New*. The account and mailbox are created. Click *Finish*.

Active Directory Users and Computers in Administrative Tools



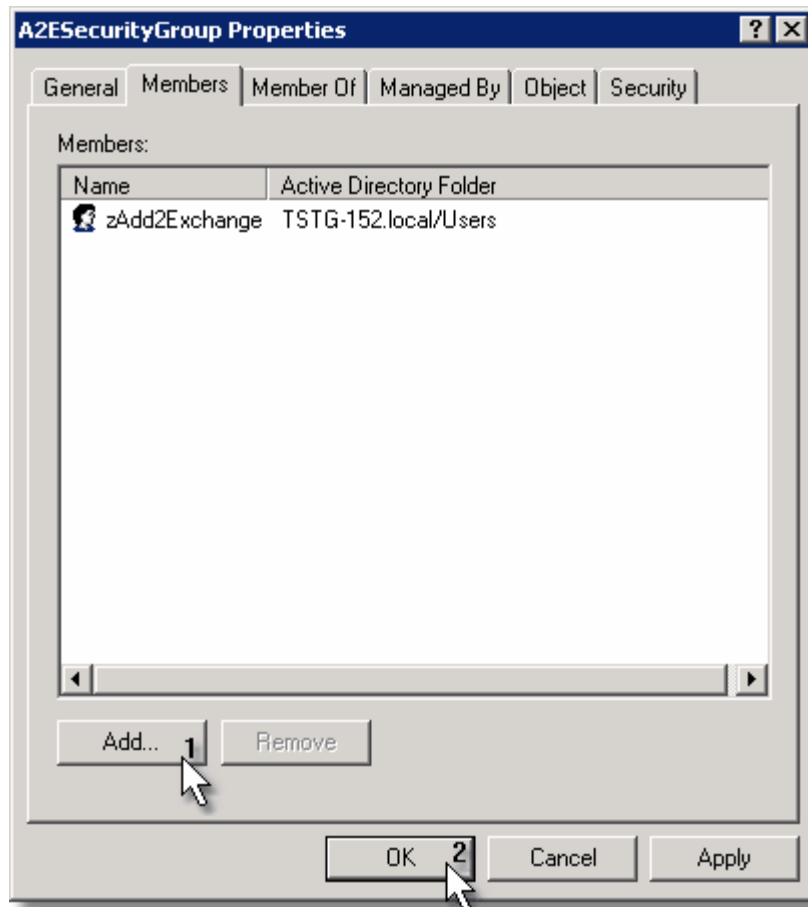
11. Open the Active Directory Users and Computers console from the Administrative Tools menu.

FolderMatic Security Group



12. Double-click the Security Group.

Security Group Members

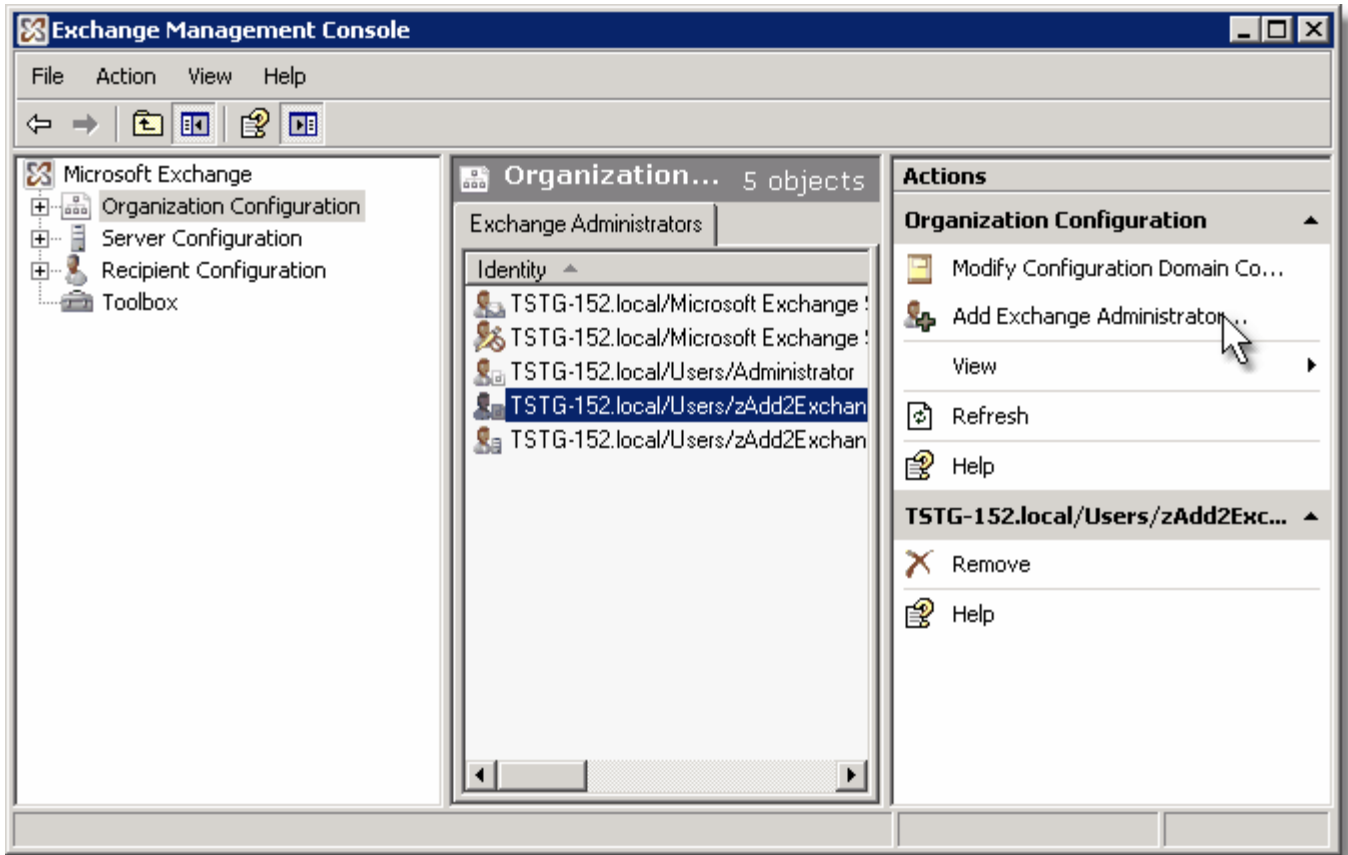


13. Click *Add...* and select the Service Account. Click *OK* and click *OK* again.

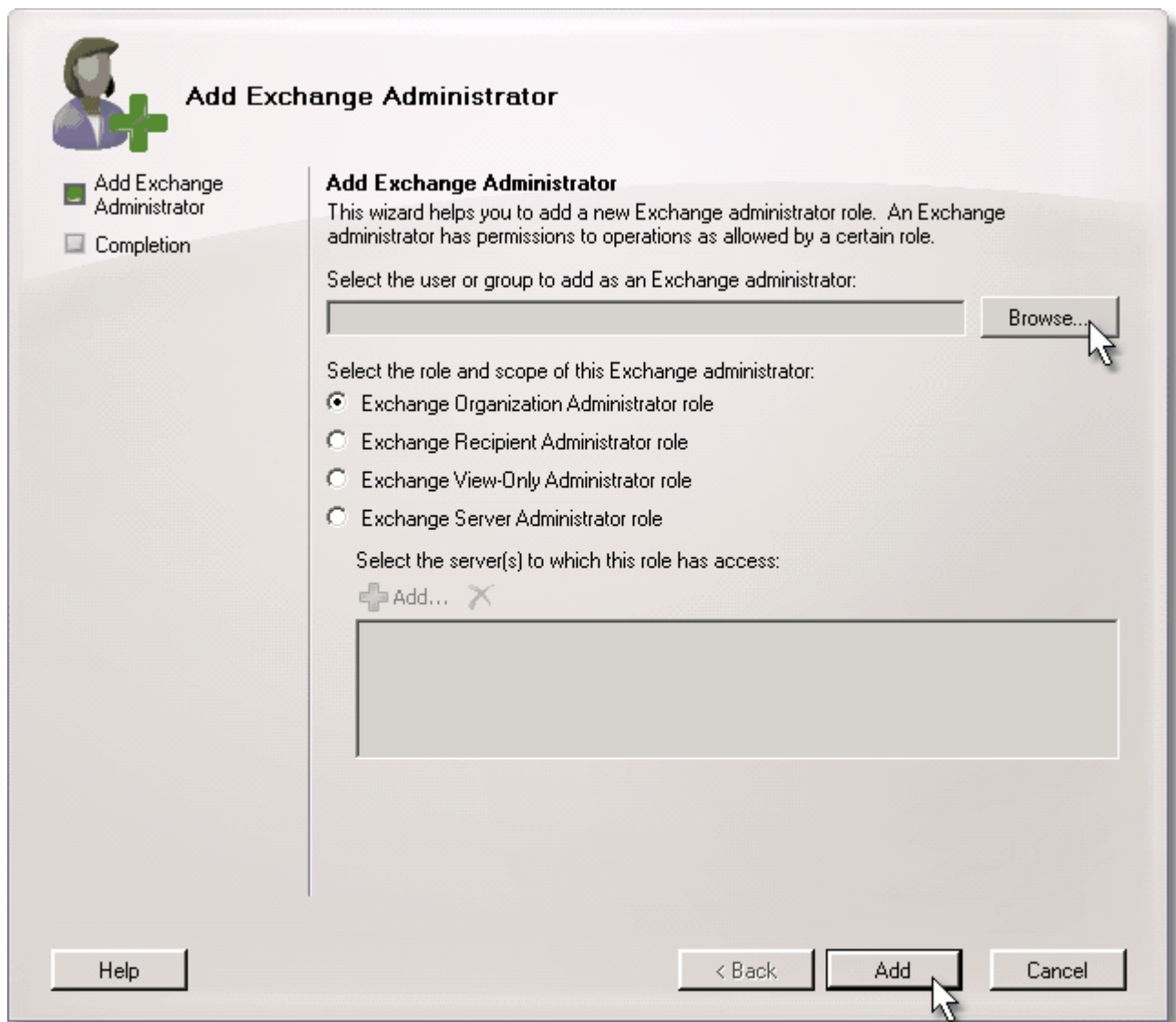
Giving the Service Account the Organizational Administrator Role

14. Return to the Exchange Management Console.

Organization Configuration in Exchange Management Console



15. Click *Add Exchange Administrator*.



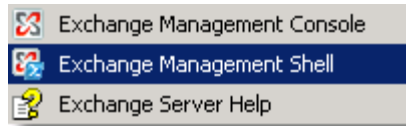
16. Click *Browse...* and select the Service Account.

17. Make sure *Exchange Organization Administrator role* is selected and click *Add*.

18. Click *Finish*.

19. Open Exchange Management Shell from the Start Menu.

Exchange Management Shell in Exchange Server 2007 Program Group



20. At the Exchange Management Shell prompt, enter the following command (use the appropriate name for the Security Group if it differs from the one shown):

```
get-exchangeserver | add-adpermission -user Add2ExchangeSecurityGroup -accessrights genericall
```

You should receive output similar to the following:

Identity	User	Deny	Rights
-----	----	----	-----
TESTING-152	TSTG-152\Add2ExchangeSecur...	False	
TESTING-152	TSTG-152\Add2ExchangeSecur...	False	CreateChild, DeleteChild
TESTING-152	TSTG-152\Add2ExchangeSecur...	False	Self, ReadProperty, WritePro...
TESTING-152	TSTG-152\Add2ExchangeSecur...	False	DeleteTree, ListObject, Dele...

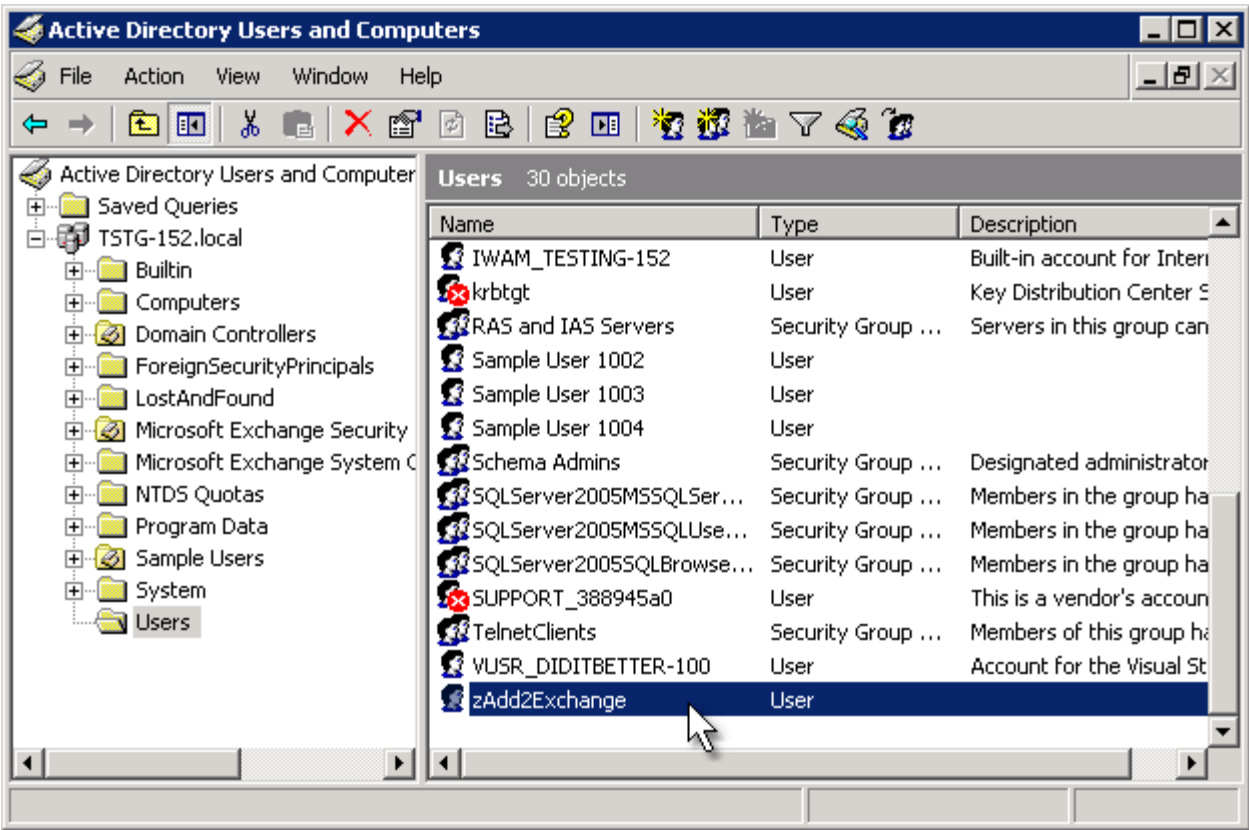
Enter the command `exit` and press Enter to close the Exchange Management Shell.

Exchange 2007 permissions settings are now configured correctly. Continue with the section ***Conditional Prerequisite: Mailbox Management through Outlook*** to continue configuration and installation of Add2Exchange.

16.1 Removing Old Service Account Permissions

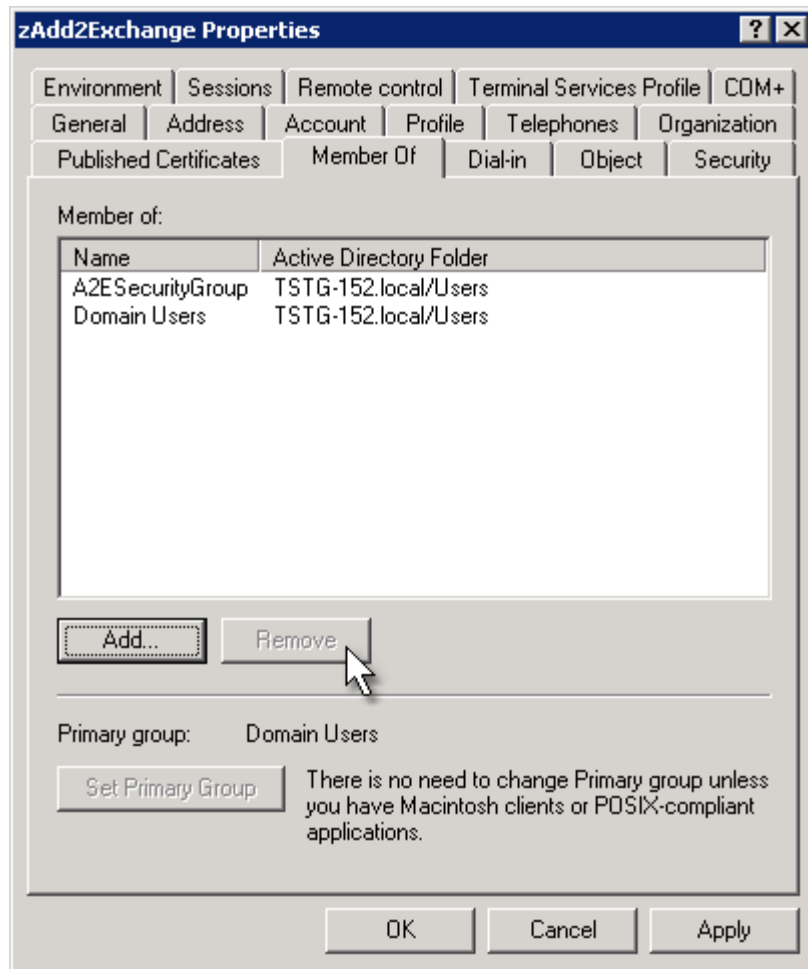
If you already have a Service Account set up for a version of Exchange prior to 2007, follow these instructions to update the Service Account for 2007-compatible permissions.

1. Open the Active Directory Users and Computers console.

FolderMatic Service Account

2. Double-click the Service Account. Select the *Member Of* tab of the Properties dialog.

Service Account Group Membership



3. Click *Remove* to remove the following groups:

- *Administrators*
- *Pre-Windows 2000 Compatibility*

4. Click *OK*.

Continue with the configuration process at the section ***Giving the Service Account the Organizational Administration Role.***

17 Appendix B: Advanced Users: Installation Summary of FolderMatic

These installation summary instructions are for existing users already familiar the installation process. If you are new user or are not familiar with the installation process, use the detailed install process in the next section: *Step by Step Pre-Installation Instructions*.

If you are already using Add2Exchange for Calendars, Contacts and Tasks, use the same account to install FolderMatic. Since the Add2Exchange Service Account already has the appropriate permissions, you can skip to the installation section located here: *Installation of FolderMatic and Upgrade Process Overview*.

Important: FolderMatic 1.0 requires the .Net Framework and if it is not installed, it will require a reboot. In some instances, the installation procedure will require a reboot for the installation to complete properly. Plan your installation for a service maintenance window as appropriate.

NOTE: Please implement ALL OF THESE PREREQUISITES in the order listed below prior to installation of the software!

- Back up your folders before installation to ensure your data.
- Ensure the .Net framework 2.x or 3.x or later has been installed and all Service Packs have been done in Add/Remove programs and Windows Update. Use the new Microsoft Update to update all Windows machines and Microsoft products on the server.
- Please see section **System Requirements** to make sure your server has the minimum Hardware and Software requirements.
- If not installed on the Exchange Server, the FolderMatic Software can be installed on a server dedicated for other purposes. Although the server may be used for other purposes such as a Blackberry Server, Backup Server, or File Server, the server should not be used daily as a user's workstation. It is not recommended that you install FolderMatic on a user's workstation unless Outlook is installed without the optional CDO component, Exchange System Manager is installed.
- Some users go against advice and use FolderMatic using Outlook with the optional CDO installed. This configuration requires the Outlook security warnings to be suppressed with a third part program such as **Mapi Labs** or **Express Click YES**. Since these security warnings are designed for security, eliminating them is not the best configuration to enhance your Email security. Again, using Outlook with Outlook CDO is possible, but NOT recommended and not supported under the free support policy.
- If Exchange or System Manager is installed, then Collaboration Data Objects (CDO) is already installed on your Server correctly. Please go to next step. If FolderMatic is not being installed on the Exchange Server, we recommend using the same version of Exchange System Manager from the installed Exchange Server located on the Exchange Setup media.
- Log on as the Domain Administrator of your Domain so you can make an account to run "FolderMatic". **READ THE FOLLOWING CAREFULLY!**
- Open up Active Directory. Make a Global or Universal Security Group. We suggest making a Universal Security

Group if it is available or else make it a Global Security Group. Since FolderMatic is a companion product to Add2Exchange, and you may use it someday, in order to be consistent we suggest calling the group something like Add2ExchangeSecurityGroup. The pictures in the step by step instructions have these as their names since it needs the same power and it made making the manual easier. Do not make an email address for the group, but do make one for the account. You will have to open up the Service Account in Outlook or OWA to fully initialize the mailbox in one of the next steps.

Tip: Do not use an existing group for this purpose. Call the Security Group anything you want, but be descriptive and be sure it is a new one. There is no need to make a mailbox for the Security Group. For more information on making a Security Group in Exchange 2000 and Exchange 2003 permissions, please see: <http://support.microsoft.com/kb/292509/en-us>.

- Next, in Active Directory, make a new user to be used as the Service Account. Make sure the container you make the account does not have any Active Directory Policies on the container. Since FolderMatic can be used with Add2Exchange, we suggest making the account named something like "zadd2Exchange" or whatever you name your service accounts. Since the Service Account cannot be hidden from the Global Address List (GAL), we suggest naming it with a "z" in front of the name so it falls to the bottom of the GAL. and is less confusing to users. Then make an email address for the Service Account.

Be careful, you will not install the software as the domain admin or administrator account, rather you will log off and back on to the target server as the new FolderMatic Service Account.

Once the Service Account has been made and the mailbox has been authorized to be created, open the properties of the Service Account and select the *Member Of* tab. Give the Service Account memberships to **ONLY** the following security groups:

Administrators

Domain Users

Pre-Windows 2000 Compatible Access

A2ESecurityGroup (or whatever you called your new Security Group)

Use **ONLY** the account memberships specified above. There is usually no need for Terminal Service Users or Remote Desktop since the Administrators group inherits this permission. There is also no need to include it in your custom groups for file system access, since the Service Account only needs local access for synchronization.

IMPORTANT: The Service Account **should not be part** of the Domain Admins or Exchange Domain Servers Group. If it is, you must remove those two groups now **OR FOLLOW THE MANUAL AND ACTUALLY CREATE A NEW ACCOUNT**. Please follow closely the rest of these instructions and make sure your system conforms to our new requirements in order to better support you.

ESSENTIAL: If FolderMatic is installed on a server other than the Domain Controller or the Exchange Server, be sure to make sure the Service Account is part of the local Administrators group of the server it is installed on **AND** part of the local Administrator's Group on the Exchange Server. If the Exchange Server is a Domain Controller, then being part of the Administrator's Group is enough. The Service Account must have Administrator credentials in order to be able to test to make sure the Exchange Server is up and ready to allow synchronization. Again, it cannot be part of the Domain Admins group or FolderMatic will fail to log on and clone the folders correctly.

Next, still logged in as your Domain Admin, open Exchange System Manager (ESM) and go to the top level of the Organization, right-click, and select *Properties*. If there is not a Security tab, for your convenience we have included a helper program in the zip file you downloaded called "ExchangeRegistrySecurity.exe". Run this on the Cloning Server and it will add the necessary registry entry for the current user to be able to see the Exchange Security Page in Exchange System Manager.

For more detailed information on what this program does, or to add the registry entry manually like some of us geeks do, please refer to Microsoft's instructions : <http://support.microsoft.com/default.aspx?scid=kb;EN-US;264733>

Once you can see Exchange System Manager Security tab, refresh the page or right-click the very top level of the system tree, go to properties and add the new Security Group you made in the previous step. By default, adding the Security Group gives the security group all rights - leave all rights and click Apply.

IMPORTANT: In this step, please **DO NOT ADD** the Service Account (zAdd2Exchange). If you have the actual Service Account listed in the Account Security Assignment Window at the Organization Level, you **MUST** remove it now. The Service Account should be a member of the Security Group and only the Security Group should be added.

Tight Security Tip: You **COULD** add the new Security Group only to the Administrative Group that contains the mailboxes and Public folders and not the entire organization, but adding it to the entire organization is quick and easy, allows for ASP operations, has easier configuration and allows for growth in a multi-server environment. It also allows this account to manage itself and it's own permissions, which is helpful.

Next, you will need to make sure the Security Group is inherited down through your Organizational Unit, and to your Mailboxes and Public Folders. Right-click on your Mailbox Store and go to Properties, Security. The Security Group should be listed there of which the Service Account is now a member with the check boxes "grayed out" to indicate inheritance from the parent. This is normal. Go on to the section Initialization of the Service Account Mailbox.

If the Security Group is not there, your organization does not have inheritance turned on in your Exchange Server hierarchy. You can either add the Security Group there now or enable inheritance. **Caution:** For minimal disruption, we suggest adding the Security Group there now. There was a reason why inheritance was turned off, so the simplest way is to add the Security Group there with full rights.

If you had to add the Security Group, please make a note to discuss with your Exchange Administrator or Computer Service provider why your Exchange Server does not have inheritance, and rectify as part of a completely different, future assignment.

17.1 Initialization of the Service Account Mailbox

Next we need to initialize the Service Account Mailbox so we can use it to use and maximize the power of FolderMatic.

You can do this in one of two ways:

On the Cloning Server: Log off as the Domain Administrator and log on to the Cloning Server as the Service Account and open up Outlook Web Access (OWA). If prompted for credentials, use the Service Account. This makes Exchange initialize the mailbox and tie it with the inherited permissions from Active Directory. When it opens, the profile is fully initialized. If you are logged into and installing this on your Exchange Server, often

times to open up OWA, you can type this address into Internet Explorer: <http://localhost/exchange>. The actual address for your organization may be different.

If you do not have OWA or do not know the correct address, you can log on from a workstation as the Service Account and create an Outlook profile for the Service Account. Please do not Install Outlook on your Exchange Server or the server you have selected for synchronization.

For more information on the power and utility of making a Service Account Mail profile in Outlook please see this section: *Mailbox Management through Outlook*.

17.2 Checklist of Prerequisites and Installation of FolderMatic

Checklist of Prerequisites

- Your system conforms to the minimum system requirements detailed in the *System Requirements* section.
- You are logged into the target server as the Service Account to download, install, and operate the **FolderMatic** software.
- The Service Account is part of the local Administrators of the local server and the Exchange Server. This does not mean that the Service Account is a part of the Domain Administrators group, just "Administrators" and an administrator of the local box and Exchange box (if different). If the Cloning Server is a Domain Controller, then it will automatically be a local administrator (if the domain administrator is part of the local administrators group).
- You have made a Security Group and added to the top level of the Exchange Organization or specifically to the mailboxes and public folders with full control. To facilitate this, follow the instructions in the *Mailbox Management through Outlook* section.
- There are no group policies which prohibit the installation of software even though the user is an Administrator of the local server. The groups the Service Account has been granted memberships have only those specified, unless special circumstances apply to your particular installation.
- If this is the Exchange Server, then CDO is already installed. If this is a File Server, we suggest installing the same version of Exchange System Manager as your Exchange Server. We strongly suggest installing Exchange System Manager of the same version (from your original Exchange media) and doing all Microsoft Updates.

Also, best practices suggest that Outlook's CDO NOT be installed on the Exchange Server, and if it is, it is best to remove it first before the installation of FolderMatic. Uninstall Outlook CDO and then reinstall Exchange System Manager from the Exchange Server disks and then go to Microsoft update and do all their updates and then reboot. This will fix your Exchange Server so it is using the correct version of CDO. After uninstall, it may be necessary to reregister the Exchange version of CDO after an Outlook CDO uninstall from the Exchange Server.

- When you open FolderMatic and create a Folder to create you must immediately be able to connect to your Exchange Server. You cannot install, configure, and upgrade this program when Exchange is offline.
- **Ready to Install**

- Download the FolderMaticSetup.zip file from www.DidItBetter.com Downloads section and unzip the file. **Tip:** Do not install programs from the Desktop. Make a directory on the drive with the most space, something called like Zlibrary\Add2Exchange. Unzip the file in that location and make a shortcut to the desktop. Install the program from there.
- Make sure you are logged on as the Service Account. This avoids the #1 most common error.
- Run the FolderMaticSetup.msi program.
- You will be prompted for location, accept the default.
- You will be prompted for the FolderMatic Log in account.
- You will also be prompted for the Exchange Server where the mailboxes and Public folders are installed. Select the Exchange Server (or Exchange Cluster name) and accept.
- After Install, logged on the FolderMatic server as the Service Account: Open the FolderMatic Console. If you have any issues opening up the Console, visit our FolderMatic Technical Bulletins area at www.DidItBetter.com or call and schedule a Remote Support case.
- Add a new Folder Relationship through the FolderMatic Console.
- Choose your Source Mailbox make the folder structure you desire to Clone.
- Choose your Relationship Characteristics - refer to the section Folder Rules in this manual.
- Pick the mailboxes the Folders should be cloned to.

Try FolderMatic FREE for 21 days, 21 relationships and but only one at a time and enjoy almost effortless creation!