MAIL FAQ

Background:

The RECM installation requires that your default email account connect to a POP3 or Microsoft Exchange account. These are the normal types of accounts used by corporations -- and, most real estate brokerages will use these types of mail servers.

If your default account is HTML (also known as MAPI) based (Live, Hotmail, or GMail -- most free email accounts are), then you'll need to temporarily change your default email account to a POP3 or Exchange account during the installation (or upgrade). You can then change it back to the HTML account after you've installed (or upgraded) RECM. See "What needs to be done".

The problem is caused because HTML accounts store your contact information on their servers in their proprietary formats and then will sync the contact information back to Outlook (so, you can see it if you're not connected to the internet). RECM is installed as part of Outlook's contact system and uses Outlook's underlying forms as a baseline for the RECM forms. Because the HTML accounts manage these forms on their servers, RECM can't work directly with them to install itself.

If you need a POP3 account, most of the domain registration companies (like GoDaddy.com or Register.com) will provide a POP3 account gratis when your register your personal or business domain with them. We recommend that you set one up if you don't already have a business domain ... if you move brokerages it makes that transition a lot easier and doesn't impact your client communications.

What needs to be done:

1. If you don't have a POP3 or Exchange account, you'll need to set one up. Ask your brokerage or register a domain with someone like GoDaddy.com
2. Set up a POP3 or Exchange as your default account
    a. Go to the main Outlook menu bar and open Tools/Account Settings
    b. Select an email account of type POP/SMTP or Exchange (there is a column showing you this)
    c. Then click on "Set as Default"
    d. Click close
3. Install RECM
4. Change your default account back
    a. Go to the main Outlook menu bar and open Tools/Account Settings
    b. Select your original email account
    c. Click on "Set as Default"
    d. Click close

Whenever you upgrade RECM you'll need to follow the above procedures as well.