



Getting Started

Help Documentation

Getting Started

SmarterMail is a feature-rich Windows mail server that brings the power of enterprise-level features and collaboration to businesses and hosting environments. Use the Getting Started section of the SmarterMail Online Help as a quick resource to help you set up the application.

Note: This section assumes you have already downloaded and installed SmarterMail from the SmarterTools website.

Setting up SmarterMail

- **Getting Started Page** - After SmarterMail is installed, a Getting Started page will load. This page includes a link to a video walkthrough of the initial setup of SmarterMail -- including each step outlined below -- as well as a link to launch the Setup Wizard.
- **License Setup** - The Setup Wizard will ask you for a valid license key to activate either the Professional or Enterprise edition of the software. If you choose not to provide a license key, the product will run as the Free edition. For more information, see [Activation](#) .
- **Primary Administrator** - This initial system administrator account will be used to manage your entire SmarterMail installation. The Setup Wizard will ask you for the username and password for this account. By default, the username is 'admin' but you can change it to any name you like. You can add additional system administrators after completing the Setup Wizard. For more information, see [System Administrators](#) .
- **System Info** - Here you'll provide information SmarterMail (or any mail server) requires in order to identify itself when sending email messages to other mail servers. The Setup Wizard will ask you for the hostname, the primary IP address that the SmarterMail service will bind to and the IP address(es) for DNS.
- **SmarterMail Paths** - Now you'll need to specify where SmarterMail stores configuration and mailbox information like domain data, the spool, log files, POP retrieval data and IMAP retrieval data. By default, SmarterMail sets paths for you on the local drive. However, if you want to store information on a separate drive, you simply need to specify the paths you want to use.
- **Spam Profiles** - Choose a spam profile to pre-configure spam settings on your server. The recommended spam profile is selected by default, but you can choose another profile with more or less spam checks if you desire. You may also further customize or change these settings after completing the Setup Wizard. For more information, see [Antispam Administration](#) .
- **Security** - Here you'll choose whether or not to boost your spam protection measures with greylisting and/or to protect your server from viruses with the built-in antivirus software, ClamAV. You can configure additional security options such as the Cyren Zero-Hour Antivirus

add-on or other third-party antivirus solutions after completing the Setup Wizard. For more information, see [Antivirus Administration](#) .

- When you click Finish in the Setup Wizard, you will automatically be logged in to SmarterMail using the primary administrator account you created earlier. From here, you'll be able to add domains and customize your mail server to meet your unique needs.

Adding the First Domain

- **Add Domain** - Now that the initial setup of your mail server is complete, you will need to add a domain to SmarterMail. Adding a domain to SmarterMail represents the business entity and the domain name (such as example.com) that will be used in the creation of individual user mailboxes. Note: Only domains that you purchased and own should be added to SmarterMail. For more information, see [All Domains](#) or the KB article [How To Add a Domain to SmarterMail](#) .
- **Configure DNS and Ports** - Now that you've created your domain, you'll need to configure the DNS and port settings for the domain. Configuring DNS settings is important because these settings tell the Internet where to send email on your domain. For step-by-step instructions on configuring DNS settings, see the KB article [How To Configure DNS for a Domain](#) . In addition, you will need to ensure that any ports that SmarterMail will use, including the standard default ports for POP3 (port 110), IMAP (port 143) and SMTP (port 25) are open on your firewall. In addition, additional ports may be required, depending on how you intend to use SmarterMail. For example, standard HTTP (port 80) for access to webmail, Secure SMTP (port 465), IMAP over SSL (port 993) or others. All of these should be opened on your firewall to ensure SmarterMail works as expected. Note: Your ISP might block specific ports, especially port 25 for SMTP, so it is recommended to contact your ISP to ensure SMTP traffic on these ports is allowed.
- **Add Users** - Now that your domain and network configurations are set up, you need to manage the domain by adding users. Any individual that should send and receive mail or have their own mailbox should be added as a user for the domain. This will create a mailbox and email address for that user (e.g., user@example.com). For more information, see [Users](#) or the KB article [How To Create a User in SmarterMail](#) .

Recommended Step to Secure Your Installation

- **Set up SmarterMail as an IIS site, if necessary.** For more information, see [Running as an IIS Site](#) . Note: If your SmarterMail installation is deployed using the default Web server, the chat functionality will not work. SmarterTools recommends converting to IIS for chat to function properly.