



Installation and Deployment

Help Documentation

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/SmarterMail/v4/http://www.smartertools.com/downloads/documents/smartermail/SmarterMail_High_Volum cannot be generated.

SmarterMail Server Requirements

The requirements of SmarterMail are minimal, so that SmarterMail can coexist with other applications on the same server. Below you will find the minimal requirements and a sample installation which may help you decide how much your hardware can process.

Minimum Requirements

- Windows 2000, Windows XP*, or Windows 2003 (all versions), Vista*
- RAM: 512MB
- CPU: 1 GHz Processor or higher
- DISK: 150 Megs
- IIS 5 or higher (Required if you will not use the SmarterMail Web Server)
- .Net 2.0 Framework

* Non server based Microsoft operating systems limit the maximum number of inbound connections to ten. For more information regarding this issue, refer to the links below. [Windows XP Pro EULA](#) | [Vista EULA](#)

It is suggested customers use IIS in place of the SmarterMail Web Server to provide additional security and stability. The SmarterMail Web Server simply allows the product to be fully functional without the existence of a marketed web server. IIS, on the other hand, is an enterprise level web server and when paired with SmarterMail, will provide the highest return on investment. For more information in using IIS to host the web interface, please refer to our [Converting to IIS page](#).

NOTE: All installations are different and extra load caused by excessive messages or email accounts may skew the server requirements. SmarterTools recommends adding domains slowly to the server once you get close to these limits and watching how they impact your server. Also, it is important to realize that email patterns indicate that email messages per account are increasing roughly 60% every two years. Keep this growth in mind when planning your rollout.

Sample Installations

| Domains | Users | Messages per Day | Requirements |
|---------|-------|------------------|---|
| 500 | 3,000 | 250,000 | <ul style="list-style-type: none"> • Windows 2000 or higher • CPU: Dual P3 • RAM: 512 MB |

| | | | |
|---------|--------|-----------|---|
| 5,000 | 30,000 | 1,000,000 | <ul style="list-style-type: none"> • Windows 2003 • CPU: Dual Xeon • RAM: 2.0 GB |
| Gateway | N/A | 2,000,000 | <ul style="list-style-type: none"> • Windows 2003 • CPU: Dual Xeon • RAM: 1.0 GB |

Installation

SmarterMail comes as a single installation file that contains everything necessary to run the product. The SmarterMail installer can be downloaded from <http://www.smartertools.com>. The free version and the licensed version of SmarterMail are both contained within this installation file, so it will not be necessary to download or install the file again if you purchase a license after trying the free version.

Note: Users of Windows 2003 Advanced Server need to install SmarterMail from Add/Remove Programs in the control panel in order for file permissions to be properly set.

If you have IIS 5.0 or later, it is recommended that you run the SmarterMail web interface under IIS instead of using the built-in web server for performance reasons. See the topic [Running as an IIS site](#) for more information.

Running Web Interface Under IIS

By default, SmarterMail will install a basic web server that allows you to start using SmarterMail immediately after installation. However, it is recommended that you move SmarterMail to a more robust and secure web server, such as Microsoft's Internet Information Server (IIS). To configure SmarterMail to run under IIS 5.0 or higher, follow the step-by-step instructions below.

This section explains how to setup SmarterMail as its own IIS site (recommended method). If you wish to run SmarterMail as a virtual directory under an existing IIS site, [click here](#).

Note: This topic assumes that you are familiar with IIS and how it works. SmarterTools recommends that you use the web server included with SmarterMail if you do not feel comfortable using IIS.

Disable the SmarterMail Web Server

While not absolutely necessary, this step will improve security and performance on your server and is highly encouraged.

These steps will stop and disable the Web Server included with SmarterMail. They will also have the side-effect of disabling the shortcut to SmarterMail on your desktop until you update it with the new URL for SmarterMail.

| | |
|--|--|
| | Click on Start -> Program Files -> SmarterTools -> SmarterMail -> Configure SmarterMail Web Server |
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| | |
|--|--------------------------|
| | Click on the Stop button |
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| | |
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| | Change the Startup Mode to Disabled and click on the Apply button |
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| | Click on the Close button |
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Add an Application Pool (Windows 2003 only)

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|--|--|
| | Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS) |
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| | |
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| | Right-click on Application Pools and choose New -> Application Pool |
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| | Name the pool SmarterMail (or something equivalent) and click OK |
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Add SmarterMail to IIS

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| | Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS) |
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| | Right-click on the web sites tree on the left of the page and choose New -> Web Site |
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| | When asked for a description, enter SmarterMail |
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| | Choose the IP address to use for webmail. If this IP address is shared with another web site, you will need to use a different port or Host Headers. For more information about using Host Headers, refer to the IIS documentation. |
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| | For Path, use "C:\Program Files\SmarterTools\SmarterMail\MRS" (or use the location in which you installed SmarterMail). |
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| | Leave the "Allow anonymous access to this web site" box checked. |
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| | When asked what permissions to grant, choose only Read and Run Scripts. |
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| | Finish the wizard |
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| | Open the web site tree for the new IIS site and right click on the mailprocessing directory. Choose Properties from the pull-down menu. |
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| | In the Execute Permissions dropdown box, choose "None" and click OK |
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| | (Windows 2003 only) Right click on the site name and choose properties |
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| | (Windows 2003 only) In the home directory tab, choose the SmarterMail application pool |
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Verify IIS Settings

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| | If you are using Windows 2003, verify that the ASP.NET v2.0.50727 Web Service Extension is set to Allowed in IIS. If you do not see ASP.NET under Web Service Extensions, ensure that ASP.NET is enabled in the Application Server. (Control Panel -> Add / Remove Programs -> Windows Components -> Application Server -> Details) |
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| | Ensure that the default document for the site is Default.aspx (under the Documents tab) |
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| | For better performance, set HTTP content expiration for 7 days on the App_Themes folder unless you are actively creating a new skin |
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| | In Windows 2003, alter application pool's performance tab to disable the "Shutdown worker processes after being idle for," or change it to a high value, like 240. |
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Update DNS

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| | If any domains are already setup with SmarterMail, make sure to update their webmail DNS records to point to the new IP address. |
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Test the Site

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| | Open up a web browser, and type in the IP address of the site you just added. |
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Running Web Interface Under an Existing IIS Site

By default, SmarterMail will install a basic web server that allows you to start using SmarterMail immediately after installation. However, it is recommended that you move SmarterMail to a more robust and secure web server, such as Microsoft's Internet Information Server (IIS). To configure SmarterMail to run under an existing web site in IIS 5.0 or higher, follow the step-by-step instructions below.

This section explains how to setup SmarterMail as a virtual directory under an existing IIS site. This is not the recommended method. While it will function properly, it is recommended that you set

SmarterMail up as its own IIS site instead. To learn how to set SmarterMail up on its own IIS site, [click here](#) .

Note: This topic assumes that you are familiar with IIS and how it works. SmarterTools recommends that you use the web server included with SmarterMail if you do not feel comfortable using IIS.

Note: Several steps that were necessary under SmarterMail 1.x are no longer necessary, and thus have been removed from this topic.

Disable the SmarterMail Web Server

While not absolutely necessary, this step will improve security on your server. As a result, while not mandatory, this step is highly encouraged.

These steps will stop and disable the Web Server included with SmarterMail. They will also have the side-effect of disabling the shortcut to SmarterMail on your desktop until you update it with the new URL for SmarterMail.

| | |
|--|--|
| | Click on Start -> Program Files -> SmarterTools -> SmarterMail -> Configure SmarterMail Web Server |
|--|--|

| | |
|--|--------------------------|
| | Click on the Stop button |
|--|--------------------------|

| | |
|--|---|
| | Change the Startup Mode to Disabled and click on the Apply button |
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| | Click on the Close button |
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Add SmarterMail to an IIS Site

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| | Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS) |
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| | Open up the Web Sites tree and locate the site under which you want to place SmarterMail |
| | Right-click on the web site and choose New -> Virtual Directory |
| | When asked for an Alias, enter "SmarterMail", "Mail", or another name. This will be used in the URL to get to webmail, as in http://www.example.com/smartermail . |
| | For Path, use "C:\Program Files\SmarterTools\SmarterMail\MRS" (or use the location in which you installed SmarterMail). |
| | When asked what permissions to grant, choose only Read and Run Scripts. |
| | Finish the wizard |
| | Open the web site tree for the new IIS site and right click on the mailprocessing directory. Choose Properties from the pull-down menu. |
| | In the Execute Permissions dropdown box, choose "None" |

| | |
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| | Click on OK to save the settings |
|--|----------------------------------|

Verify IIS Settings

| | |
|--|---|
| | If you are using Windows 2003, verify that the ASP.NET v2.0.50727 Web Service Extension is set to Allowed in IIS. If you do not see ASP.NET under Web Service Extensions, ensure that ASP.NET is enabled in the Application Server. (Control Panel -> Add / Remove Programs -> Windows Components -> Application Server -> Details) |
|--|---|

| | |
|--|---|
| | Ensure that the default document for the site is Default.aspx (under the Documents tab) |
|--|---|

Update DNS

| | |
|--|--|
| | If any domains are already setup with SmarterMail, make sure to update their webmail DNS records to point to the new site. |
|--|--|

Test the Site

| | |
|--|---|
| | Open up a web browser, and type in the URL of the virtual directory (ex. http://www.example.com/virtualdirectory). |
|--|---|

Activating SmarterMail

UPDATE: Activating an installation on this version requires manual activation. Please contact the SmarterTools Sales Department for assistance.

In order for SmarterMail to function for more than 1 domain with 10 users, the product must be activated. If you move SmarterMail to another server, you may have to re-activate the product in order for it to work. To get to the product activation wizard, click on the Help menu and choose Activate Product.

If you have any difficulties activating SmarterMail, please contact SmarterTools support. Information can be found at www.smartertools.com.

Upon going to the Activate Product page, you will be presented with a screen showing your current license details. In order to complete this step, you will need a valid license key and password that were emailed to you when you obtained your license key. Enter in the information from the email into the boxes and click on Activate Now to complete the activation.

Note: Activation of a license key requires the server to contact SmarterTools over port 443 (HTTPS). Please ensure that any firewall or internet security software you have installed allows an outgoing TCP port 443 request.

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Installation Checklist

This checklist highlights the important steps to get SmarterMail up and running. For more details on each item, click on the more info links.

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| | Run the installer, and choose a location to install the files. more info |
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| | If you have IIS 5.0 or later, convert the web interface to run under IIS. more info |
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| | Login to SmarterMail as the System Administrator. more info |
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| | If you have a license key, Activate SmarterMail. more info |
| | Change the System Administrator username and password. more info |
| | Add a domain to SmarterMail. more info |
| | Configure DNS settings for the domain. more info |

Upgrade Instructions

To upgrade an older version of SmarterMail to the most recent 4.x release, perform the instructions below.

Please note that if you are upgrading from a version previous to 4.0, and you are not running under the Free Edition, you will need to upgrade your license key first.

From a previous 4.x release

For example, if you are upgrading from SmarterMail 4.0 to SmarterMail 4.1.

- Backup your SmarterMail installation and data
- Download and run the installer for the updated version ([download here](#))
- When asked where to install the product, install into the same location as it was installed before (by default C:\Program Files\SmarterTools\SmarterMail)
- All configuration data and email will be preserved

From a release before 4.0

For example, if you are upgrading from SmarterMail 3.x to SmarterMail 4.x.

- Backup your SmarterMail installation and data
- Ensure you have a valid license key for SmarterMail 4.x
- Uninstall your current version of SmarterMail. All configuration data and email will be preserved.
- Download and run the installer for the updated version ([download here](#))
- When asked where to install the product, install into the same location as it was installed before (by default C:\Program Files\SmarterTools\SmarterMail)
- If you are using IIS to host SmarterMail's Web Interface, change the mapping of ASP.Net to version 2.0 in the IIS properties for the site. ([more info](#))
- If you are not running the Free Edition, log into SmarterMail as the system admin, go to Help - > Activate Product and reactivate with your license key.