



# Installation and Deployment

Help Documentation

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## Deployment Guides

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SmarterTools deployment recommendations fall into three categories: Individual and micro-business architectures, Small to medium-sized business architectures, and High-volume architectures.

For the purposes of these recommendations:

- Individuals and micro-businesses shall be defined as mail environments with average email volumes of up to 25,000 messages per day (12,500 In / 12,500 Out). This infers a maximum of 100 employees/users. Information regarding these architectures is available in the SmarterMail in Individual and Micro-Business Deployments document.
- Small to medium-sized businesses shall be defined as mail environments with average email volumes of up to 400,000 messages per day (200,000 In / 200,000 Out). This infers a maximum of 1600 employees/users. Information regarding these architectures can be found in the SmarterMail in Small to Medium-sized Business Deployments document.
- High-volume deployments shall include ISPs, Hosting Companies, Large Businesses, and Enterprise organizations with average email volumes numbering in the millions. This infers organizations with many thousands of employees/users. Information regarding these architectures can be found in the SmarterMail in High Volume Deployments document.

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## 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, Windows 2008, 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 third-party web server. IIS, on the other hand, is an enterprise level web server and when paired with SmarterMail, will provide the highest performance. For more information in using IIS to host the web interface, please see [Converting to IIS](#) .

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"> <li>• Windows 2000 or higher</li> <li>• CPU: Dual P3</li> <li>• RAM: 512 MB</li> </ul>
5,000	30,000	1,000,000	<ul style="list-style-type: none"> <li>• Windows 2003</li> <li>• CPU: Dual Xeon</li> <li>• RAM: 2.0 GB</li> </ul>
Gateway	N/A	2,000,000	<ul style="list-style-type: none"> <li>• Windows 2003</li> <li>• CPU: Dual Xeon</li> <li>• RAM: 1.0 GB</li> </ul>

## 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. To configure IIS7 in Windows 2008, please see the end of this page.

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
--	--

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

	Change the Startup Mode to Disabled and click on the Apply button
--	---

	Click on the Close button
--	---------------------------

### Add an Application Pool (Windows 2003 only)

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
--	--

	Right-click on Application Pools and choose New -> Application Pool
--	---

	Name the pool SmarterMail (or something equivalent) and click OK
--	--

### Add SmarterMail to IIS

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
--	--

	Right-click on the web sites tree on the left of the page and choose New -> Web Site
--	--

	When asked for a description, enter SmarterMail
--	---

	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.
	For Path, use "C:\Program Files\SmarterTools\SmarterMail\MRS" (or use the location in which you installed SmarterMail).
	Leave the "Allow anonymous access to this web site" box checked.
	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 mail processing directory. Choose Properties from the pull-down menu.
	In the Execute Permissions dropdown box, choose "Scripts Only" and click OK
	(Windows 2003 only) Right click on the site name and choose properties

	(Windows 2003 only) In the home directory tab, choose the SmarterMail application pool
--	--

## 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)
--	---

	For better performance, set HTTP content expiration for 7 days on the App_Themes folder unless you are actively creating a new skin
--	---

	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.
--	--

## Update DNS



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

### Test the Site

	Open up a web browser, and type in the IP address of the site you just added.
--	---

## Configuring IIS7 for Windows 2008.

### Disable the SmarterMail Web Server

	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
--	---

	Click on the Close button
--	---------------------------

### Add an Application Pool

	Click Start -> Control Panel -> Administrative Tools -> Internet Information service (IIS) Manager
--	--

	Right click Application Pools and select "Add Application Pool"
--	---

	Name the pool "SmarterMail" (or something similar)
--	--

	Set Managed Pipeline Mode to "Classic" and click OK
--	---

### Add SmarterMail to IIS

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Service (IIS) Manager
--	---

	Select ServerName -> Open ISAPI and CGI Restriction -> Verify that ASP.NET v2.0 is allowed (If not, right click on ASP.NET v2.0 and select "Allowed")
--	---

	On the left side of the page, right click and choose "Add Website"
--	--

	Name the Site "SmarterMail"
--	-----------------------------

	If you created an Application Pool name other than "SmarterMail" click Select and choose the correct Application Pool
--	---

	<p>For the physical path, browse to the SmarterMail\MRS folder. The default location is C:\Program Files\SmarterTools\SmarterMail\MRS</p>
--	---

	<p>For Binding, choose an 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.</p>
--	---

	<p>Click OK</p>
--	-----------------

## Verify IIS Settings

	<p>In IIS Manager click ServerName. Under Security double click ISAPI and CGI Restrictions. Then, verify that ASP.NET v2.0 is allowed. If it is not right click on ASP.NET v2.0 and select "Allowed."</p>
--	---

	<p>In IIS Manager double click Sites -&gt; Double click the SmarterTools site -&gt; Double click on the App_Theme folder. Under HTTP features double click HTTP Response Headers. Under the Action menus, click Set Common Headers -&gt; Check Expire Web content -&gt; Click After -&gt; Click the add 7 for the number of days -&gt; Click OK</p>
--	---

	In Administrative Tools under Services, Verify that World Wide Web Publishing Service is Running
--	--

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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. To configure IIS7 for Windows 2008, please see the end of this page .

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
--	---

	Click on the Close button
--	---------------------------

### Add SmarterMail to an IIS Site

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Services (IIS)
--	--

	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 <a href="http://www.example.com/smartermail">http://www.example.com/smartermail</a> .
--	--

	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 mail processing directory. Choose Properties from the pull-down menu.
--	--

	In the Execute Permissions dropdown box, choose "None"
--	--

	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. <a href="http://www.example.com/virtualdirectory">http://www.example.com/virtualdirectory</a> ).
--	---

## Configure Virtual Directory in IIS7 in Windows 2008

### Disable the SmarterMail Web Server

	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
--	---

	Click on the Close button
--	---------------------------

## Add an Application Pool

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Service (IIS) Manager
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	Right click on Application Pools and choose "Add Application Pool"
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	Name the pool SmarterMail (or something equivalent)
--	---

	Set Managed Pipeline Mode to "Classic" and click OK
--	---

## Add SmarterMail to IIS Virtual Directory

	Click on Start -> Control Panel -> Administrative Tools -> Internet Information Service (IIS) Manager
--	---

	Select ServerName -> Open ISAPI and CGI Restrictions and verify that ASP.NET v2.0 is allowed. (If it is not, right click on ASP.NET v2.0 and select Allowed.)
--	---

	Right click on a Web site and choose Add Virtual Directory
--	--



	When asked for an Alias, enter "SmarterMail" or something similar. (This will be used in the URL to get to WebMail, as in <code>www.example.com/smartermail</code> )
--	--

	For the physical path, browse to the SmarterMail\MRS folder. Default location: C:\Program Files\SmarterTools\SmarterMail\MRS
--	---

	Click OK
--	----------

	Right click on the Alias "SmarterMail" (or whatever name you gave to your Application Pool) and select Convert to Application
--	---

	Click on Select to change the Application Pool to the SmarterMail Pool
--	--

	Click OK, and then OK
--	-----------------------

## 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 activate the product, click the Settings button from the main toolbar, then select Activate Product from the Activation folder in the left tree view.

If you have any difficulties activating SmarterMail, please contact SmarterTools support. Information can be found on the SmarterTools Support page.

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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## Performing a Full Uninstall

Note: Following these steps is not necessary to upgrade an existing installation.

The steps below can be taken to completely delete all SmarterMail related files and data from a system.

- Uninstall Mail through Control Panel->Add Remove Programs
- Delete C:\SmarterMail (default location, may differ if changed by user)
- Delete C:\Program Files\SmarterTools\SmarterMail (default location, may differ if changed by user)

## 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.

	Run the installer, and choose a location to install the files. <a href="#">more info</a>
--	--

	If you have IIS 5.0 or later, convert the web interface to run under IIS. <a href="#">more info</a>
--	---

	Login to SmarterMail as the System Administrator. <a href="#">more info</a>
	If you have a license key, Activate SmarterMail. <a href="#">more info</a>
	Change the System Administrator username and password. <a href="#">more info</a>
	Add a domain to SmarterMail. <a href="#">more info</a>
	Configure DNS settings for the domain. <a href="#">more info</a>

## Upgrade Instructions

To upgrade an older version of SmarterMail to the most recent 5.x release, perform the instructions below.

Please note that if you are upgrading from a version previous to 5.0, and you are not running under the Free Edition, you will need to upgrade your license key first.

### From a previous 5.x release

For example, if you are upgrading from SmarterMail 5.0 to SmarterMail 5.1.

- 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 5.0

For example, if you are upgrading from SmarterMail 4.x to SmarterMail 5.x.

- Backup your SmarterMail installation and data
- Ensure you have a valid license key for SmarterMail 5.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.
- 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.