



ChoiceMail Small Business Installation Guide

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1 Introduction



Installation Guide For ChoiceMail Small Business Edition v4.x

(March 2007)

[Downloading and Installing CMSB](#)
[Configuring ChoiceMail Small Business](#)
[Setting up user accounts in ChoiceMail Small Business](#)

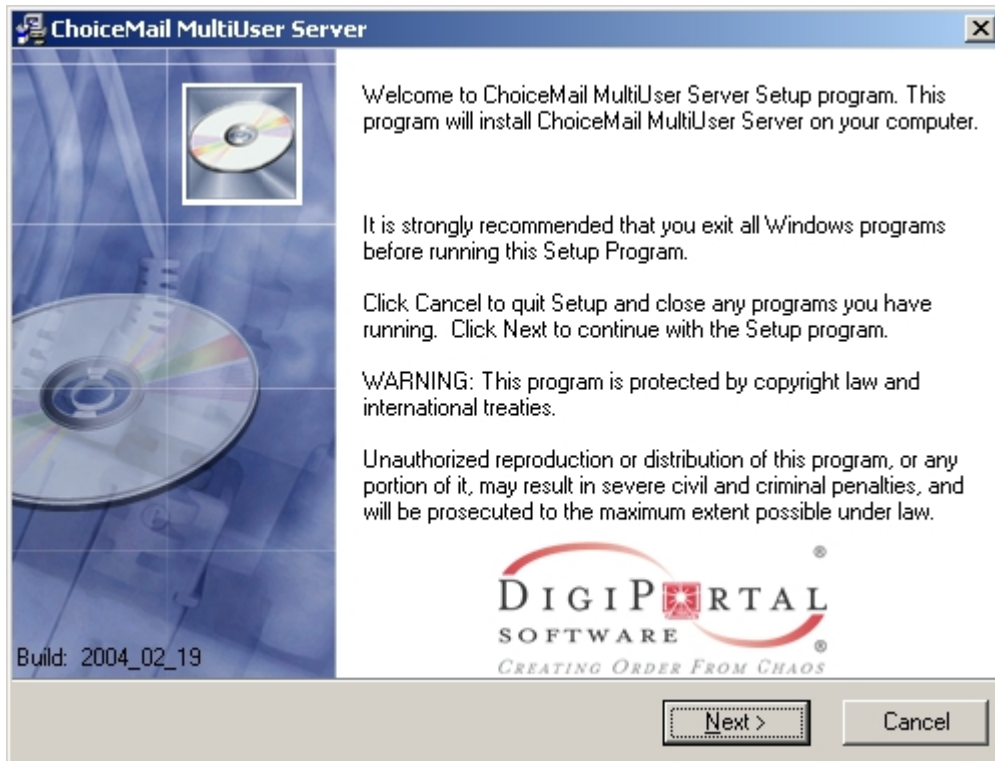
[Logging into CMSB from a web browser](#)
[Entering in your Usercode and Key into ChoiceMail Enterprise](#)

2 Downloading and Installing CMSB

Download the installer for the latest version of ChoiceMail Small Business from the URL that you were given by DigiPortal Software. You may find it convenient to save the downloaded installer directly to your desktop so you can find it more easily. If you are saving the download to a different location, please remember the location so you can navigate to it once the download is complete.

Once you have downloaded the installer, simply double-click on it to begin the installation (or update).

Screen 1



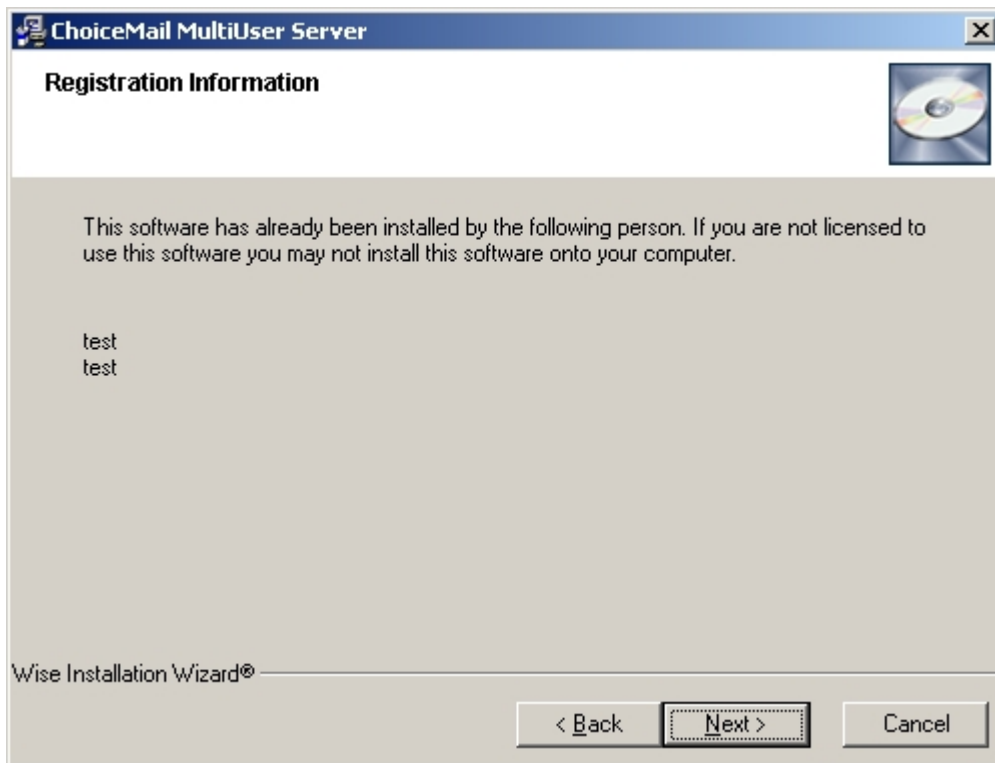
Click Next

Screen 2



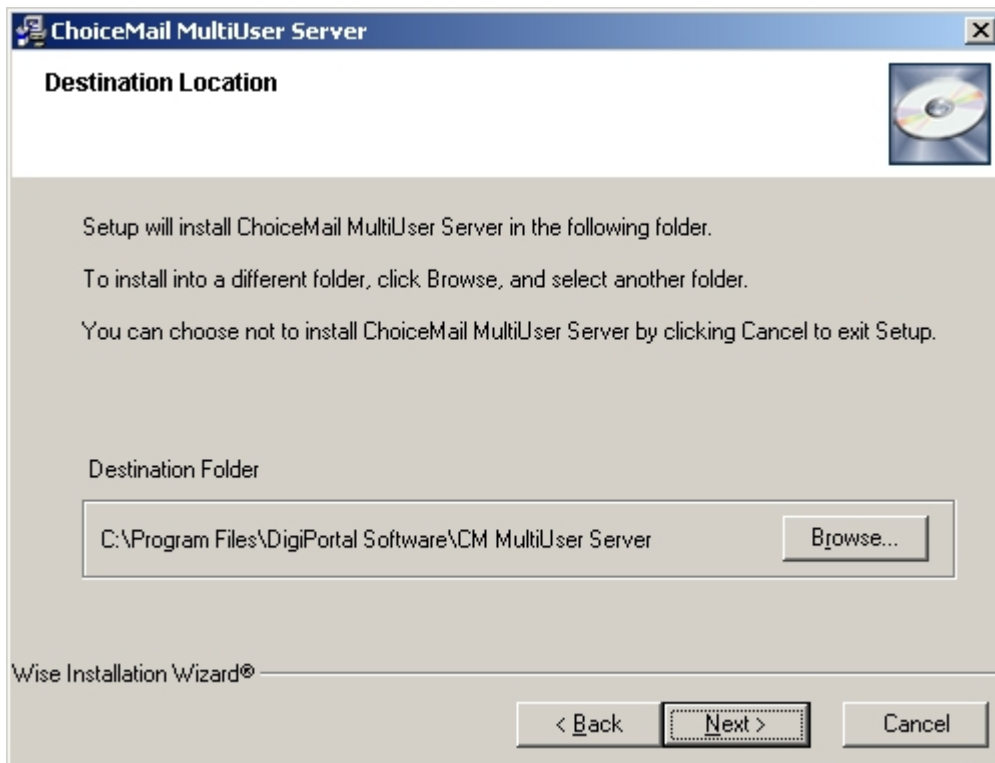
Enter your name and the company for which ChoiceMail Small Business is being installed. Click Next.

Screen 3



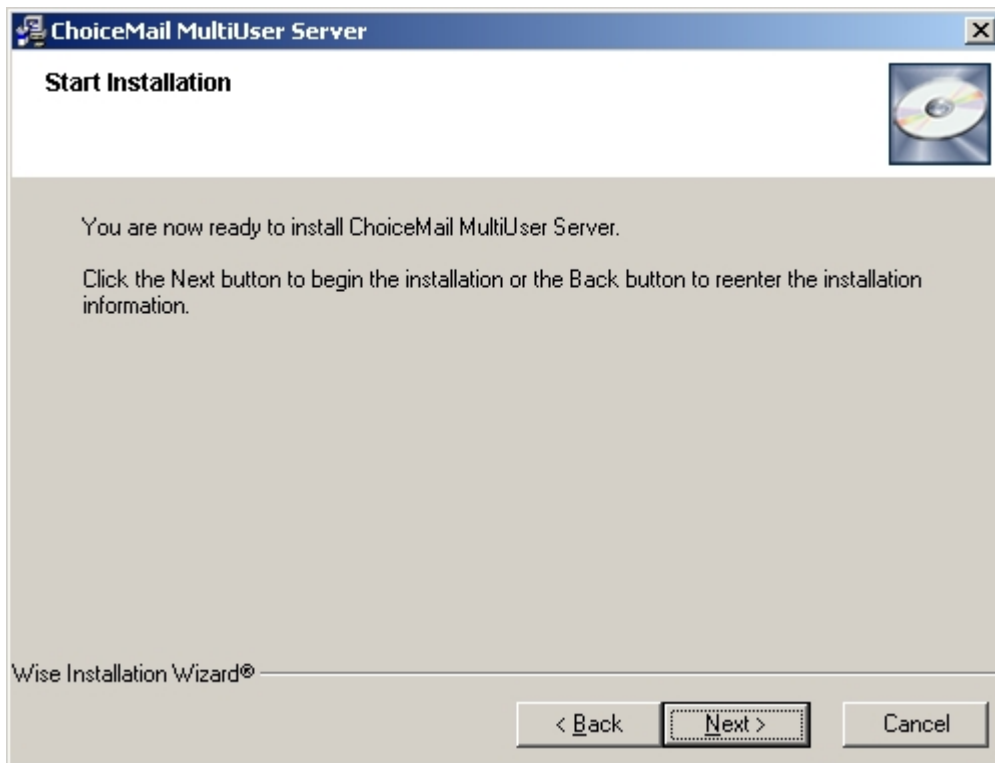
This is a confirmation screen. If any of the information is incorrect simply click Back otherwise click Next to continue.

Screen 4



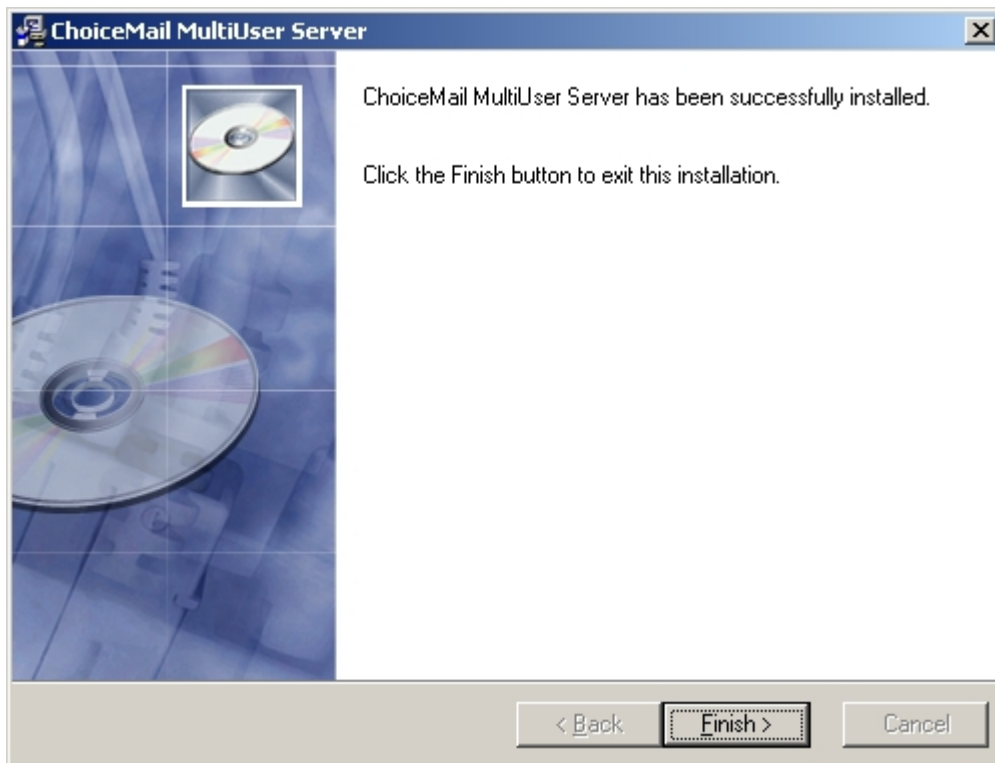
This is the default location to where ChoiceMail Small Business will be installed. If you wish to install ChoiceMail Small Business in another location, click Browse and choose the desired location. Once you have made your selection click Next. **If you want ChoiceMail Small Business to pick up your existing settings (for example, if you are upgrading from a previous version), then you MUST install it directly over the current version.**

Screen 5



This is a confirmation screen letting you know that you are about to install ChoiceMail Small Business. Click Next to proceed or Back if you need to modify your choices. The status and progress of the installation of ChoiceMail Small Business will be displayed.

Screen 6



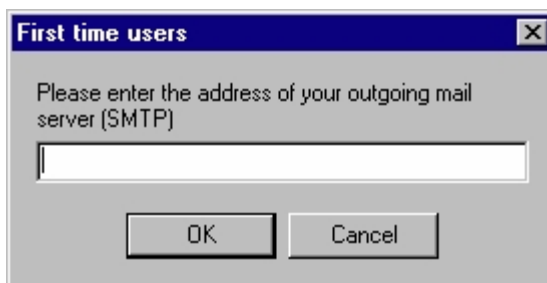
Click Finish to complete the installation of ChoiceMail Small Business.

Please access the ChoiceMail Small Business Control Panel by clicking on the "ChoiceMail Server" shortcut on your desktop.

3 Getting Started

3.1 Configuring ChoiceMail Small Business

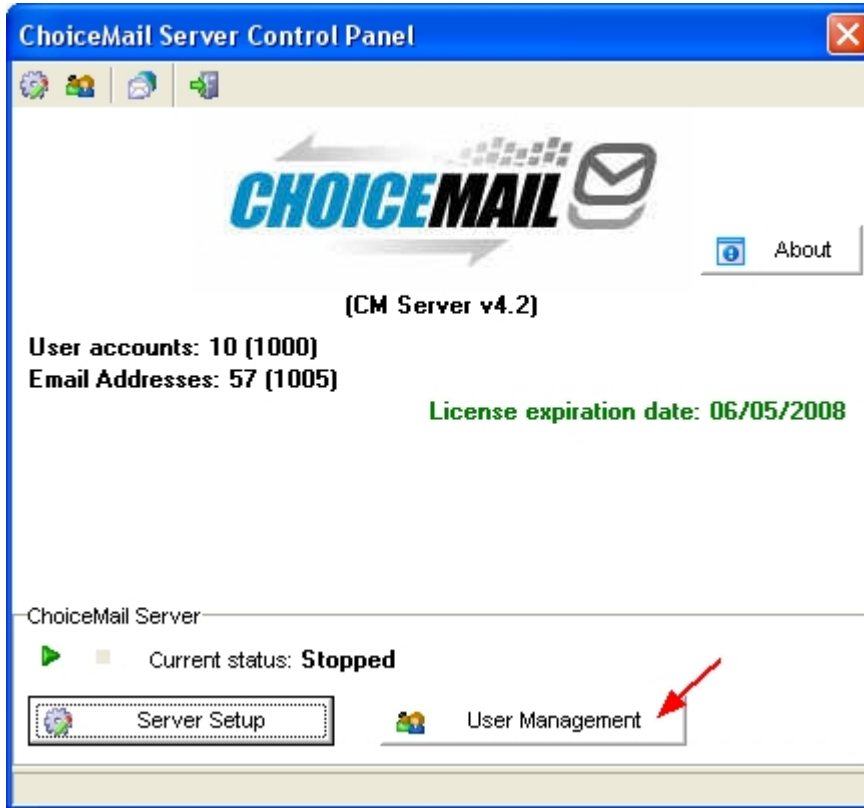
First time you start ChoiceMail Small Business Sserver (application version) you will be presented with the following dialog:



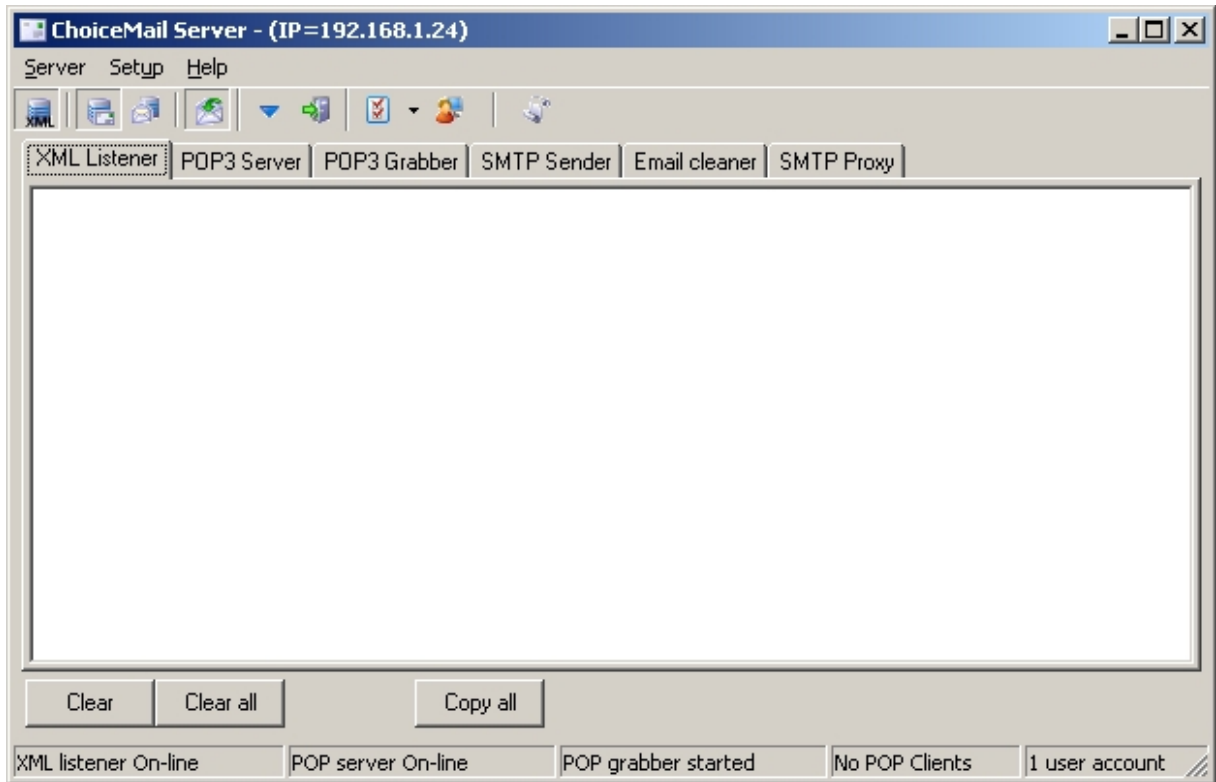
Enter the name of the SMTP server associated with the Internet Service Provider (ISP) that you use for your connection.

If you do not know the name of your SMTP server, please contact your ISP. The setting is the same setting you currently have in your email application.

This is the main ChoiceMail Small Business Control Panel in case you are running the SERVICE version

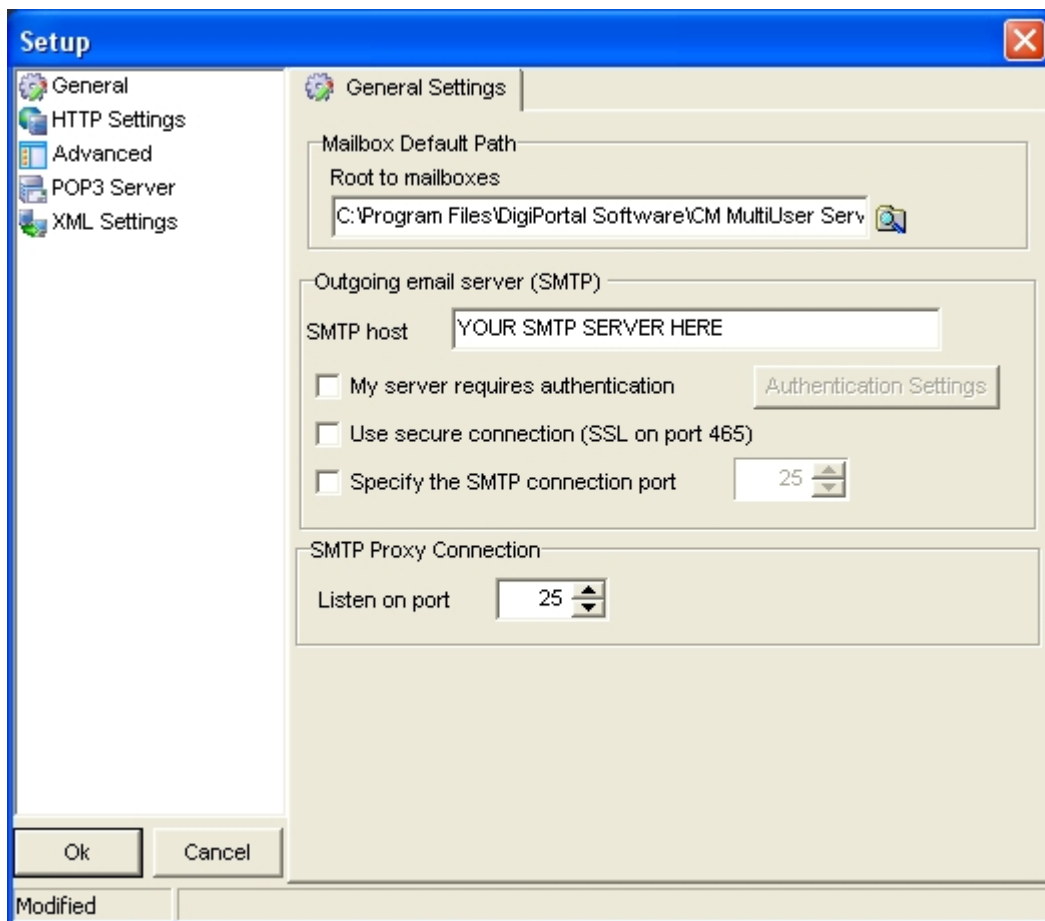


In case you are using the Application version of CMSB you will see this screen



Click the setup tab, then click on main and then general. Or just click on "Server Setup" button on the Control Panel above to open the General settings dialog.

General Settings



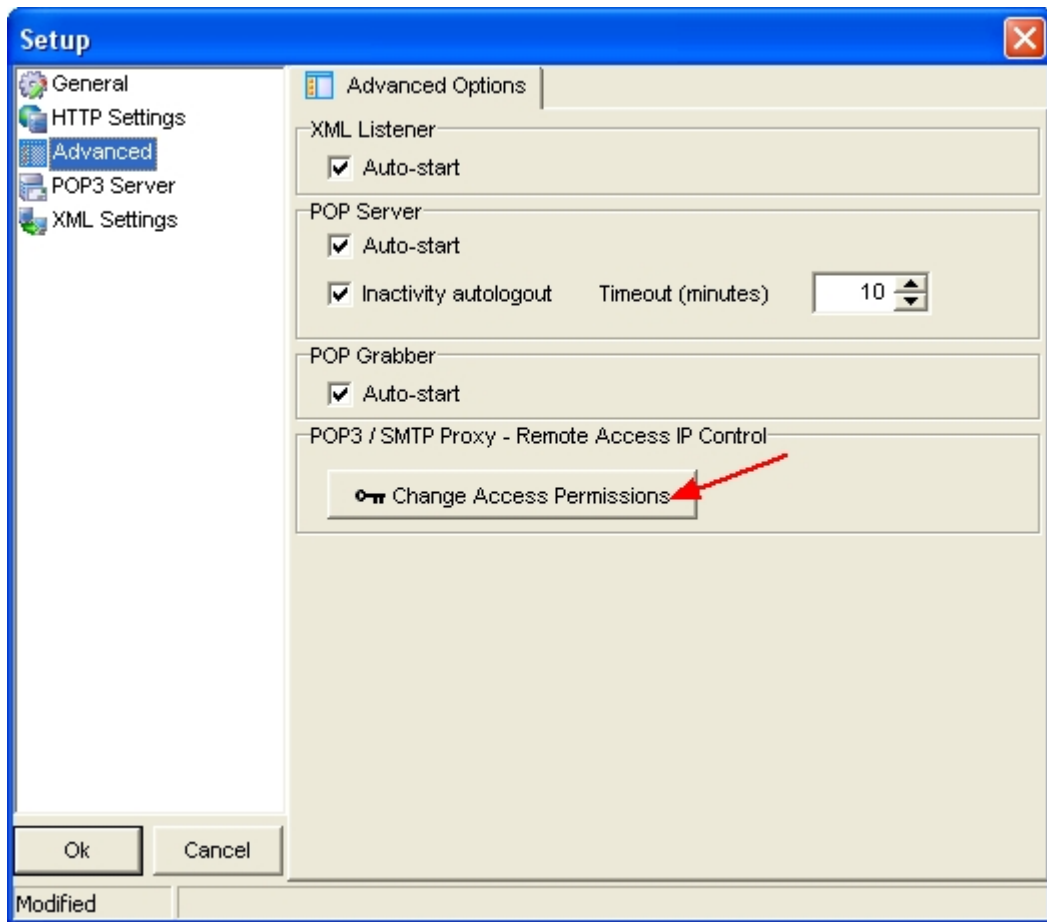
This is the General Tab with the initial default settings.

Normally you will not need to change anything in this dialog except the Outgoing server settings.

SMTP host should be set to your host ISP. If your SMTP server requires authentication - make sure you check the "My Server Requires Authentication" box and enter a valid username and password. This can be any username and password working on that server.

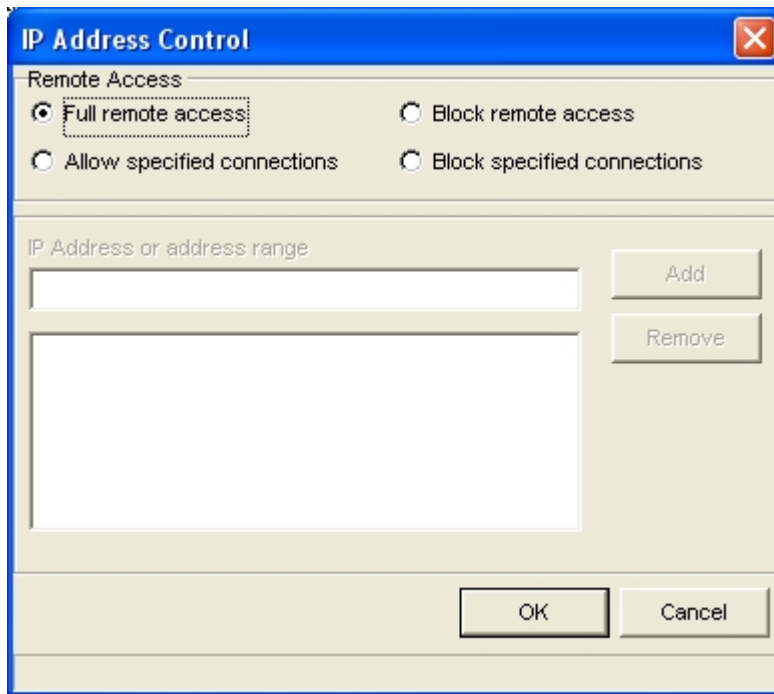
Click on Advanced Settings. The following will show up

On this screen please click on the 'Change Access Permissions' button.



This will bring up the IP Address control panel.

By default it is set to 'Block remote access', you will need to change this to either '**Full remote access**' or '**Allow specified Connections**'.

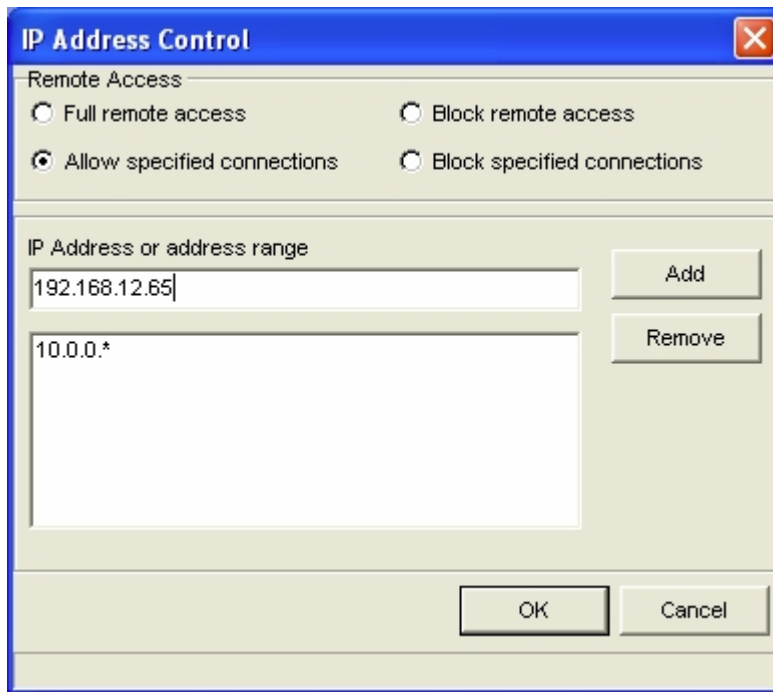


If you choose 'Full remote access' then you are done and can click OK at the bottom of the screen.

'Full remote access' will permit anyone to connect to ChoiceMail as long as they can get to the server it is being hosted on.

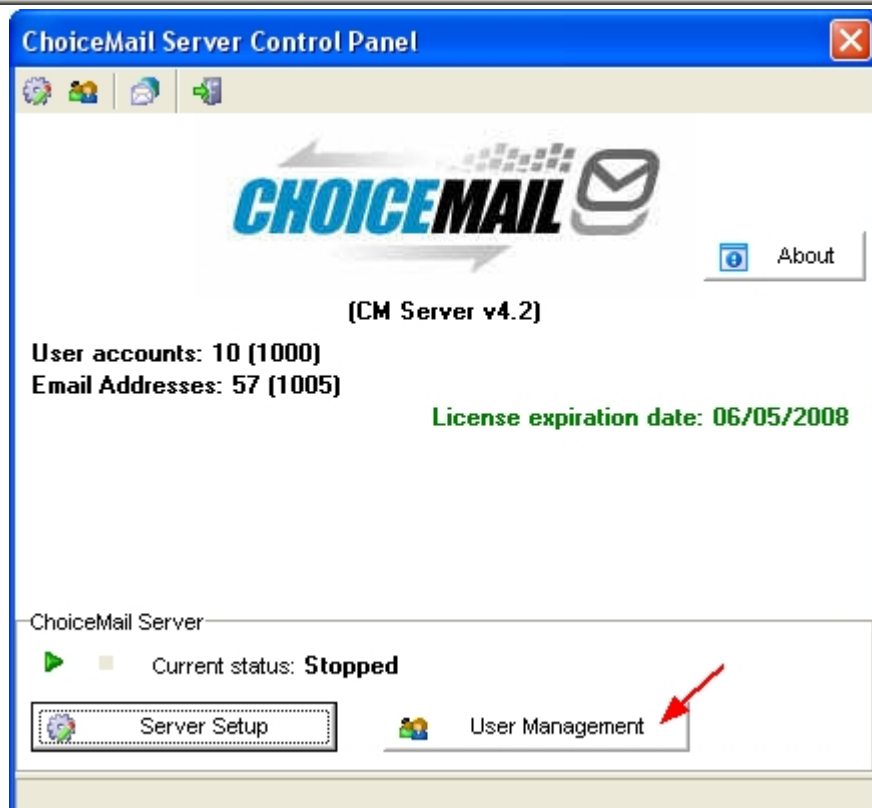
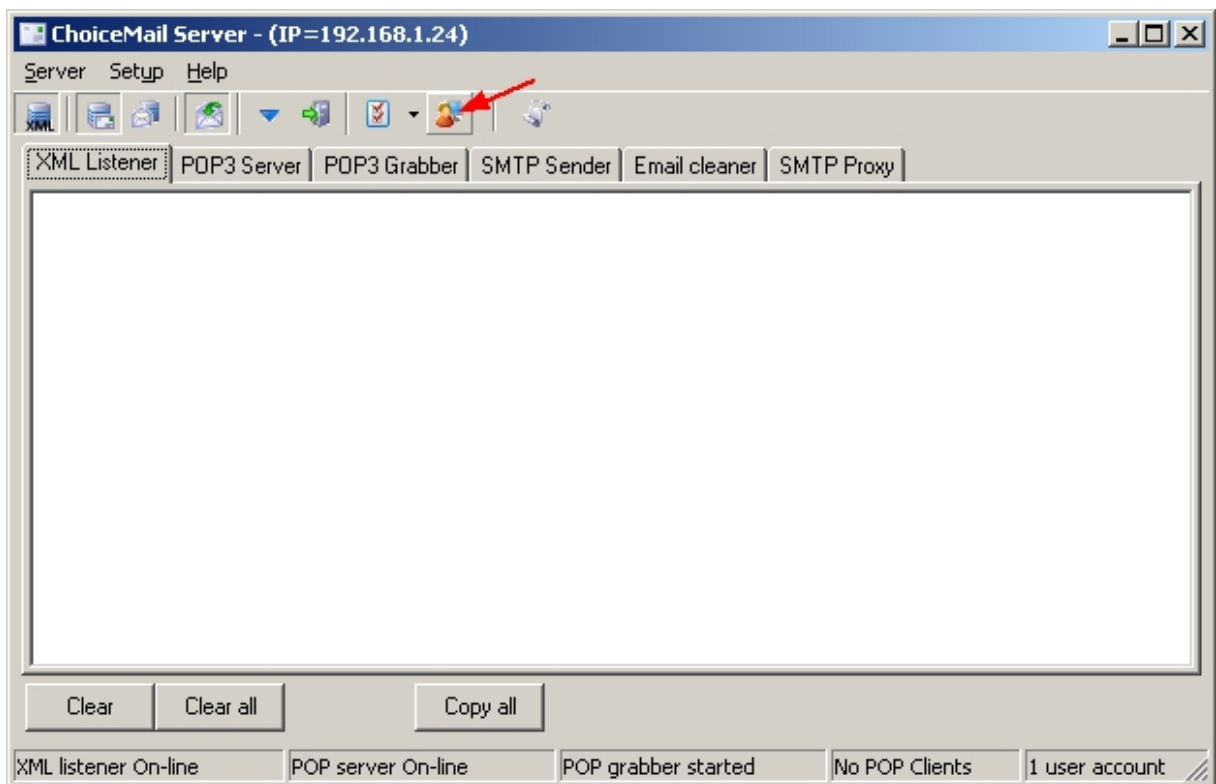
Normally this is the default setting. ChoiceMail will still not permit email relaying even with this setting on "Full Remote Access". Users have to POP the mail first before they are allowed to send.


If you choose the option to 'Allow Specified connections' then you will need to supply the IP address of each machine that is allowed to connect to ChoiceMail Server. Example below shows that anyone on the local network with an IP address of 10.0.0.* will be able to access the server and ChoiceMail. The * lets you match a range of IP addresses. In addition you will see that an outside IP address was being added. This could be an IP address of someone working from home or at another office. Just remember that you must type one value or IP address at a time then click Add. Once you are done go ahead and click OK at the bottom of the screen.

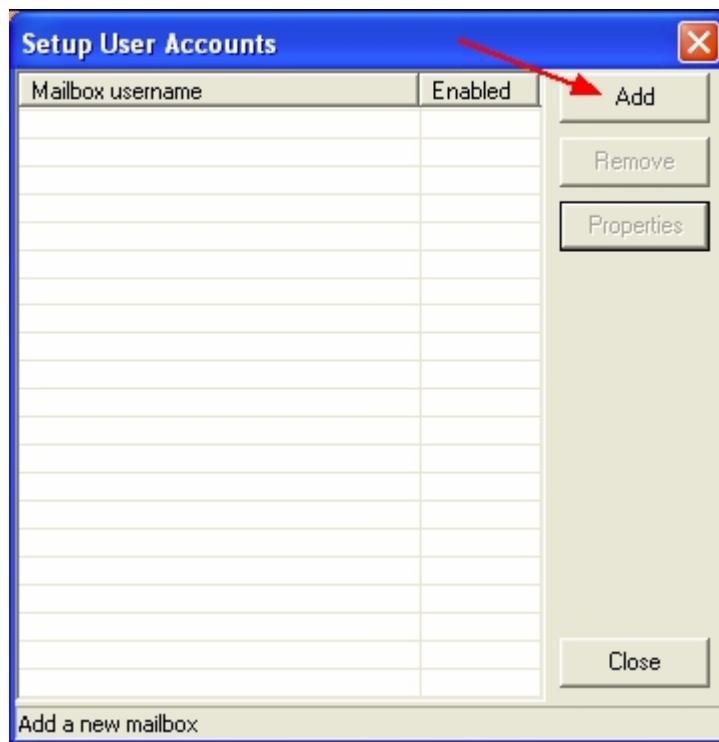


[You can now move on to configuring user accounts!](#)

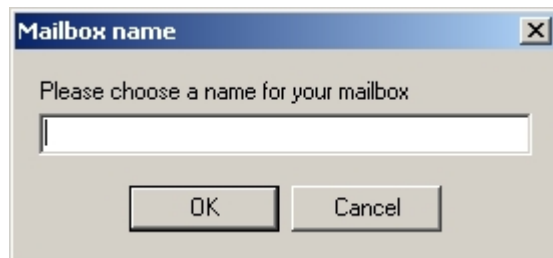
3.2 Setting up user accounts in ChoiceMail Small Business



Click on  to begin creating user accounts in ChoiceMail Small Business. Or "User Management" button on the Control Panel.

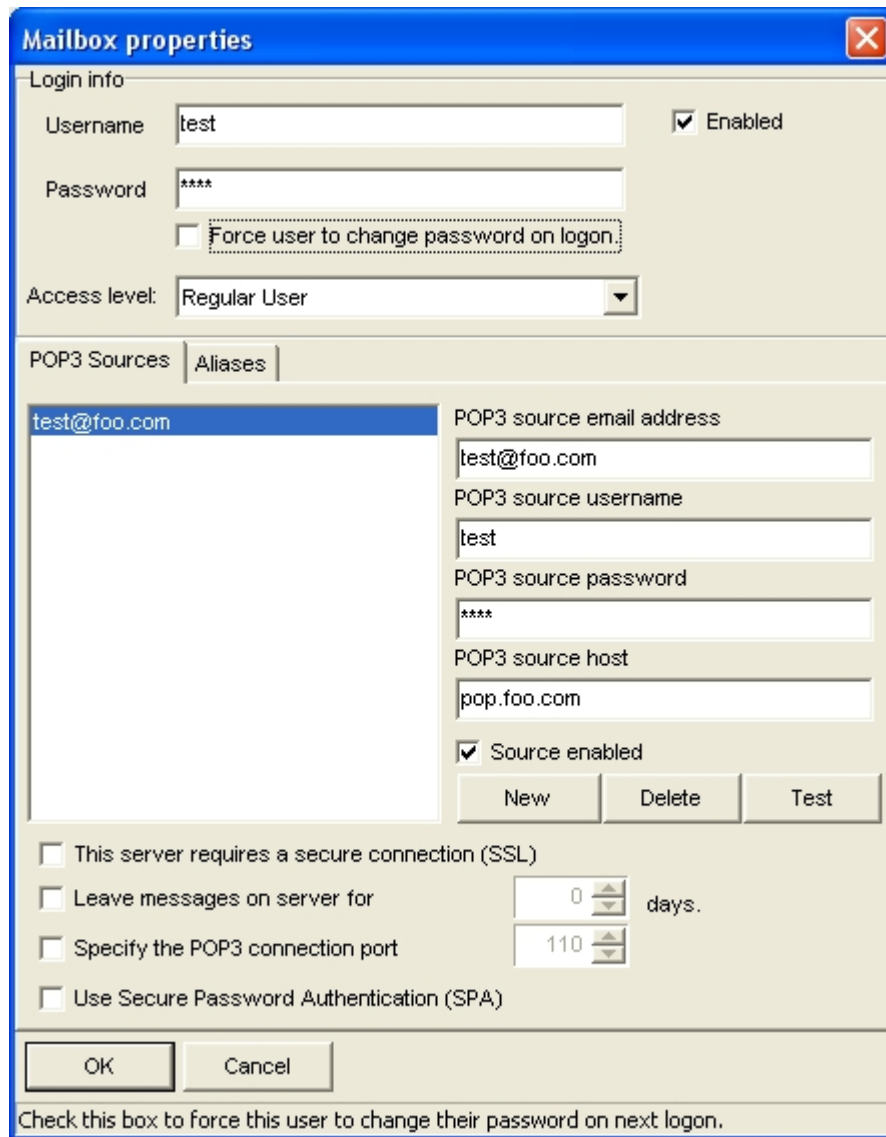


Click the Add button to add a new User.



Type in a username for this account.

This will be the username that this user will need to provide when he/she accesses ChoiceMail Small Business. We strongly recommend that you use the same username as their existing email username. For example ... if your username in your email application (to access your mail) was user1@foo.com - we recommend you use the same for your ChoiceMail username.



The image shows a 'Mailbox properties' dialog box with the following sections:

- Login info:** Username: test, Password: ****, Force user to change password on logon: , Access level: Regular User (dropdown), Enabled:
- POP3 Sources / Aliases:** A list on the left contains 'test@foo.com'. To the right, fields include: POP3 source email address: test@foo.com, POP3 source username: test, POP3 source password: ****, POP3 source host: pop.foo.com, and Source enabled: . Buttons for New, Delete, and Test are present.
- Options:** This server requires a secure connection (SSL), Leave messages on server for 0 days, Specify the POP3 connection port 110, Use Secure Password Authentication (SPA).
- Buttons:** OK, Cancel.
- Footer:** Check this box to force this user to change their password on next logon.

The username should already present on this screen. You will need to modify the following settings:

Password: We recommend that the password and username be the same as those values set by the user in their email program. So basically - you should use your email password here.

Enabled: Check this box to enable this user account. (Disabling a user account here will stop the user from logging into the ChoiceMail interface)

Force user to change password on logon: This is totally up to you and typically will depend on your company policy. However, you should NOT check this box if you plan to allow your users to continue using their current password.

Access Level: For most users, set this field to Regular User. If a particular user will be responsible for (and authorized for) configuring ChoiceMail Small Business itself then the

access level should be set to Administrator. Most employees will be set up as 'Regular User'

Click on the "New" button to create a new POP3 source.

POP3 source email address: This is your full email address.

POP3 source username: This is your email username exactly as it is in your email application.

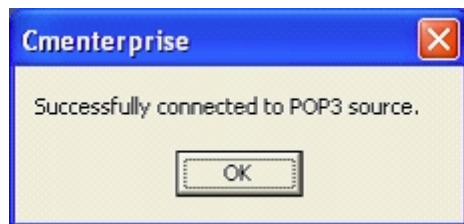
POP3 source password: Your email password

POP3 source host: Your ISP POP3 server address.

(All of the above can be copied from your email application.)

Make sure that "Source enabled" checkbox is checked.

Click on the "Test" button to test the settings. You have to get a "Successfully connecte" message.



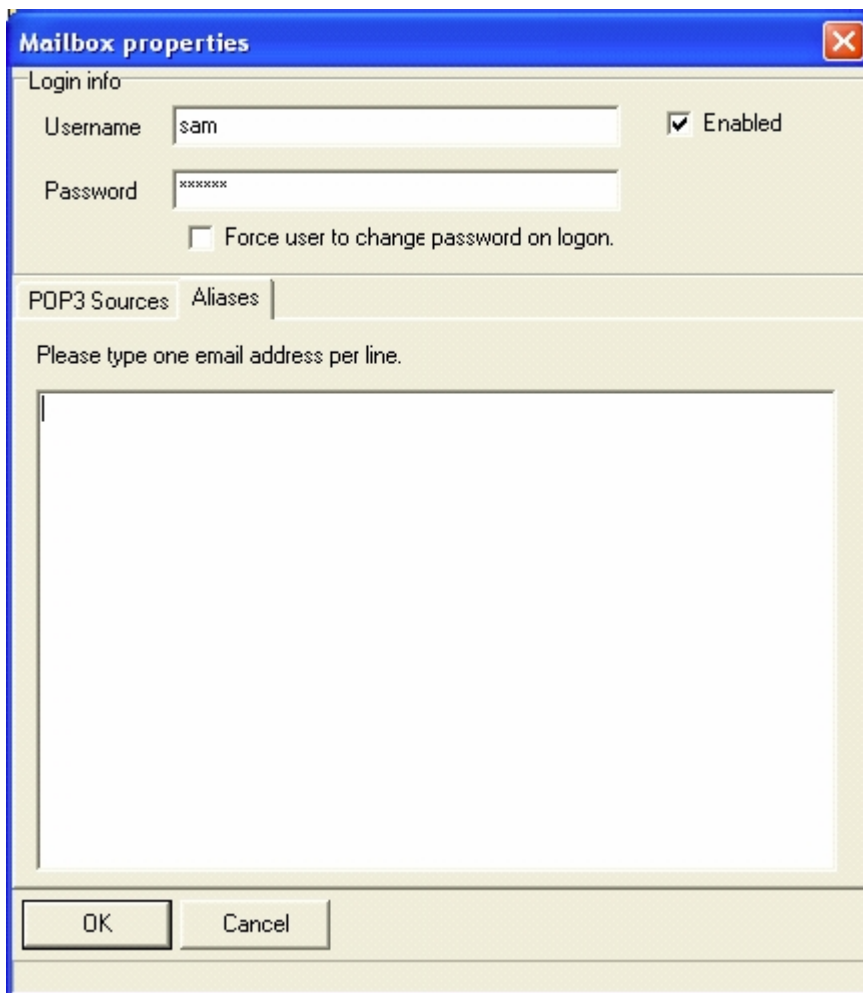
Use Secure Password Authentication (SPA): UNCHECKED unless your ISP or email service provider tells you that you must use this.

This Server Requires A Secure Connection (SSL): UNCHECKED unless your ISP or email service provider tells you that you must use this.

Specify The POP 3 Connection Port: UNCHECKED unless your ISP or email service provider tells you that you must use this. This PORT is used to connect to your ISP or email service provider and does NOT have anything to do with the ChoiceMail connecting to your email client.

Leave mail on server: Leaves mail on your ISP server for specified number of days.

If User has any Aliases going to this email account you must tell ChoiceMail about them. Click on the Aliases Tab at the top of the screen.



The image shows a 'Mailbox properties' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections. The top section, 'Login info', contains a 'Username' field with the text 'sam', a 'Password' field with 'xxxxxxx', and a checked checkbox labeled 'Enabled'. Below these is an unchecked checkbox labeled 'Force user to change password on logon.'. The bottom section, 'Aliases', has a tabbed interface with 'Aliases' selected. It contains the instruction 'Please type one email address per line.' and a large empty text area for input. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

You can enter one alias per line here.

Click **OK** at the bottom of this screen to save your settings.

Click on Close.

ChoiceMail will NOT start downloading emails until the User's email client has successfully connected to ChoiceMail first. ChoiceMail will not download mail that it knows it can not deliver.

If you are running the Service version - please make sure you START the service before continuing. ChoiceMail must be running to filter email and serve the clients.

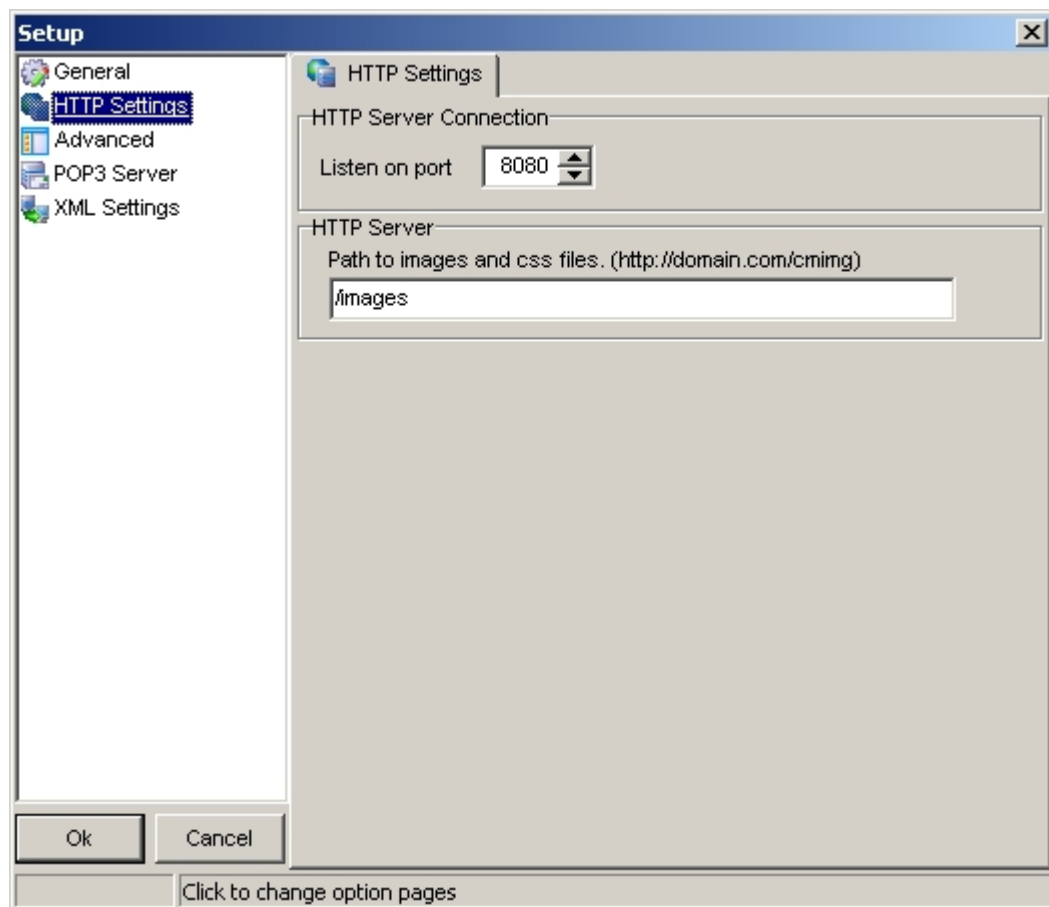
Changing Settings in your Email program

1. For every email account that ChoiceMail is protecting, that user must modify their Email program so that it now connects directly to ChoiceMail.
2. In the email program or client that they are using they MUST change the POP3 and SMTP servers to the machine name that ChoiceMail is running on. You would

- normally use the machine's IP address or name.
- The Usernames and Passwords MUST match what was entered into ChoiceMail when their account was being set up. (as per above instructions). If you kept the usernames and passwords the same as your ISP - then there is no need to change them.
 - They MUST click on Send/Receive in their email program to ensure that ChoiceMail and their email program can communicate. Remember until this is done successfully ChoiceMail will NOT download any mail for that User.

Congratulations!! ChoiceMail is now protecting you Inbox(s)

4 HTTP settings



- Listen on port:** Choice Mail Small Business includes its own web server. Users can use a web browser to log in to ChoiceMail Small Business, review their unknown senders, approve senders who register, preview their approved mail and configure their personal settings. Administrators can manage global senders list, change user accounts and so on. This port number becomes part of the URL for the ChoiceMail Small Business web interface. The default value is 8080, but it can be changed to any unused port number on that machine. In our example above, the port number is 8080 (Default) so the URL

to access ChoiceMail Small Business from a web browser would be:

<http://yourCMSBserver:8080/> (for regular user login)

http://yourCMSBserver:8080/admin_login.html (for administrator/manager login)

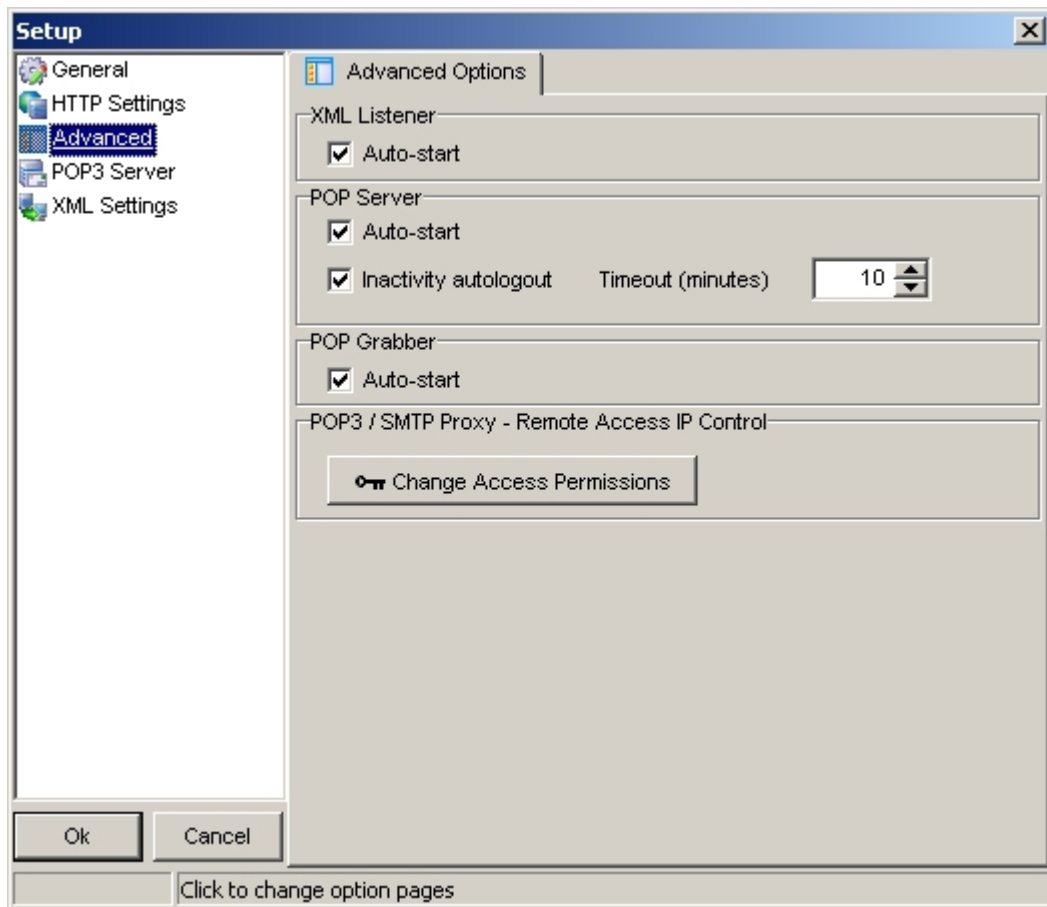
- **Path to images ...** : The default is /images which means that ChoiceMail Small Business will serve all images. If you have many users, you can offload image serving to another web server within your network. Any standard webserver such as the popular (and free) Apache server or Microsoft IIS will work. **This will significantly improve the performance of ChoiceMail Small Business.**

To offload image processing, copy all the "\images" from ChoiceMail Small Business to a folder on your webserver and then reference the location of that folder through the appropriate URL. All ChoiceMail Small Business images are located in the folder called Templates\Images\ underneath the folder where you installed ChoiceMail Small Business. For example, if you copy the contents of this folder to your web server's "cmfiles" folder—then the path you would enter into this box would be

<http://yourdomain.com/cmfiles/>

5 Other settings

It is recommended that you Leave these at their default settings. Do not disable ANY of the Auto-Start checkboxes.



- **XML Listener, POP Server and POP Grabber sections**
Listens in background for XML connections. Used with legacy clients.
- POP3 / SMTP Proxy - Remote Access IP Control
- **Change Access Permissions:** This setting is explained in the [Configuring ChoiceMail Small Business](#)
- POP3 Server and XML Settings tabs are used to change how these server components server the clients.

6 Logging into CMSB from a web browser

Open a web browser (Internet Explorer, Netscape, Mozilla, Firefox, etc.) and type in the IP address or URL of the machine where ChoiceMail Small Business has been installed i.e. <http://ChoiceMailServer:8080> or <http://192.25.25.3:8080> (8080 = the default HTTP Server Port used by ChoiceMail. If you have changed this for any reasons such as a port conflict then use the port number to which you changed it.)

Enter the username and password that you created in ChoiceMail Small Business when you originally set up your account under the section called: 'User Management'

If you wish to log as an administrator – you would use the URL similar to the following.
http://ChoiceMailServer:8080/admin_login.html or
http://192.25.25.3:8080/admin_login.html

(The IP address should be that of the server where ChoiceMail Small Business is running and 8080 is the default HTTP Server Port used by ChoiceMail Small Business.)

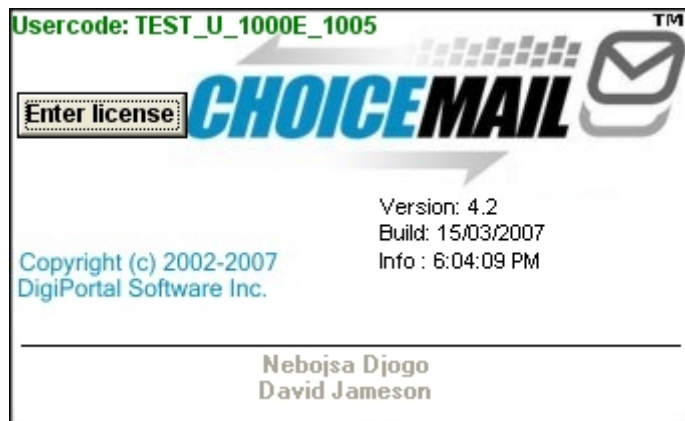
Please refer to the user guide or administrative guide for detailed web browser interface options and screenshots.

7 Entering in your Usercode and Key into ChoiceMail Enterprise

The trial version of ChoiceMail Small Business expires after a preset number of days (normally 14 days). Once your trial expires, ChoiceMail Small Business will no longer block any messages. When you purchase ChoiceMail Small Business, you will be sent a usercode and key that will unlock ChoiceMail Small Business permanently for the number of users for which you bought your license. Please follow the steps below to authorize ChoiceMail Small Business:

Open the ChoiceMail Small Business Control Panel by clicking on the shortcut on the desktop shortcut or by choosing Configure ChoiceMail Small Business within the DigiPortal Software Applications of our Program menu.

Click the About button



When the About ChoiceMail Small Business dialog appears, click on '**Enter License**'



Enter in the Usercode and Key that was sent to you and then click OK.
Click on **'Click here to close'** to close the About ChoiceMail Small Business dialog.

If you just entered the license you will receive a message that the program will close now.

If you are using ChoiceMail Small Business Application version - simply restart your ChoiceMail. If you are using the service version - please re-open your ChoiceMail Control Panel and stop and start the ChoiceMail service for changes to take effect.

We recommend that you run ChoiceMail Small Business (service version) with the Control Panel closed.

Click on the X in the upper right hand corner of the dialog to close the ChoiceMail Enterprise Control Panel.

8 Troubleshooting

8.1 ChoiceMail Enterprise Server Will Not Start

If clicking the Play button for ChoiceMail Small Business server displays 'Start Pending' and then 'Stopped' the typical cause is a port conflict. You may get a specific port conflict message that will indicate which port is already in use on your server. Depending on the conflict you may choose to change the port of that other service or change the port settings in the ChoiceMail server.

NOTE: If you have a conflict on port 25 then some other server is already listening for incoming mail. You must change that port or stop the service if it is running. Do not change the ChoiceMail Small Business incoming port from 25 unless you are absolutely sure you know that it is ok to do so. In some cases "Microsoft Simple Mail Transport Protocol" is installed on the server without your knowledge. If your Mail server is located

on another server – you probably don't even use this service and it should be stopped regardless of ChoiceMail Small Business. Go to your "Services" settings – find the service and the stop and disable it.

If the port conflict is related to port 8080 (HTTP Port) for example. Please do the following.

1. Under ChoiceMail Small Business Server click on Server Setup.HTTP Settings Tab
2. Change HTTP Server Connection -> Listen on Port from 8080 to 81 or 85 (note that doing so will require you to use the new port in URL used to access ChoiceMail Small Business)
3. Click OK to save your settings.
4. Restart the ChoiceMail Enterprise Server

8.2 ChoiceMail Enterprise Server Not Installed

If you see either this error or 'Outgoing Mail Server not installed,' this simply means that during installation one of the servers was not installed. To rectify this please do the following:

Double click on the Hard Drive where you installed ChoiceMail Small Business. By default this will be the C: drive unless you have chosen another location.

Double click on Program Files

Double click on DigiPortal Software

Double click on CM Small Business

Find a file called **uninstallcmsbsvc.cmd** and double click on it.

You should get 2 notices saying 'Service uninstalled successfully.' If the services were not installed you may get some errors – it is safe to ignore these.

You may have to click OK as each one comes up.

Find a file called **installcmsbsvc.cmd** and double click on it.

You should get 2 notices that 'Service installed successfully'

You may have to click OK as each one comes up.

9 Contacting DigiPortal Software

DigiPortal Software Technical Support

Our home page is <http://www.digiportal.com> and technical support is available through our website.

The following URLs on our website should be helpful in answering many questions as well providing technical notes for special cases. These pages are growing continuously and you should check them often for updates. Animated tutorials are also available.

Support URLs

Direct access to the ChoiceMail support site and knowledgebase

<http://www.digiportal.com/esupport/uploadZend/>

Contacting DigiPortal Software

Please make sure you review our knowledgebase before submitting a support request. It is extremely likely that your issue has already been addressed. You may also want to contact the administrator in your company who is responsible for managing ChoiceMail.

In the unlikely event that your problem has not already been addressed on our website, and you do need to contact DigiPortal Software, please use the following URL to enter a trouble-ticket:

<http://www.digiportal.com/esupport/uploadZend/>

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