Lease Provider Getting Started Guide

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Introduction

Welcome to the SmarterTools Partner Program. This document will help you navigate the Leasing section of your account on the SmarterTools website. Below you will find instructions to start, modify, and stop leases for SmarterMail, SmarterStats, SmarterTrack, and add-ons.

Managing Your Partnership

Account Management

When you're logged into the SmarterTools website, you can change your contact information, view invoices and payments, manage mailing list subscriptions, and add other employees with an authorized login or as an additional contact for your account.

Leasing Account

The "Leasing" section under your account will allow you to view reports pertaining to the partnership and start new or manage current leases. You can also see, and download, a list of customers who have leased or are currently leasing licenses from you.

Invoices

Because Lease Providers don't pay in advance for the lease usage, the SmarterTools Partnership does require a credit card to be on file for auto-pay, as this card would be used to automatically charge the monthly invoices. An invoice is generated and auto-paid on the 1st of each month. The invoice will contain all leases that were active during the previous month. Leases that were started *after* the 1st of the previous month would be charged a pro-rated amount (based on a 28-day cycle). Partners can view and pay invoices, download invoices as a PDF, or email invoices on the **Invoices** page of the SmarterTools website.

Managing Leases

Start a New Lease License

Follow these steps to start a new lease for a customer:

1. Log into your Lease Provider account on the SmarterTools website: https://www.smartertools.com/.
2. Hover over the account menu icon and click on **Leasing**.
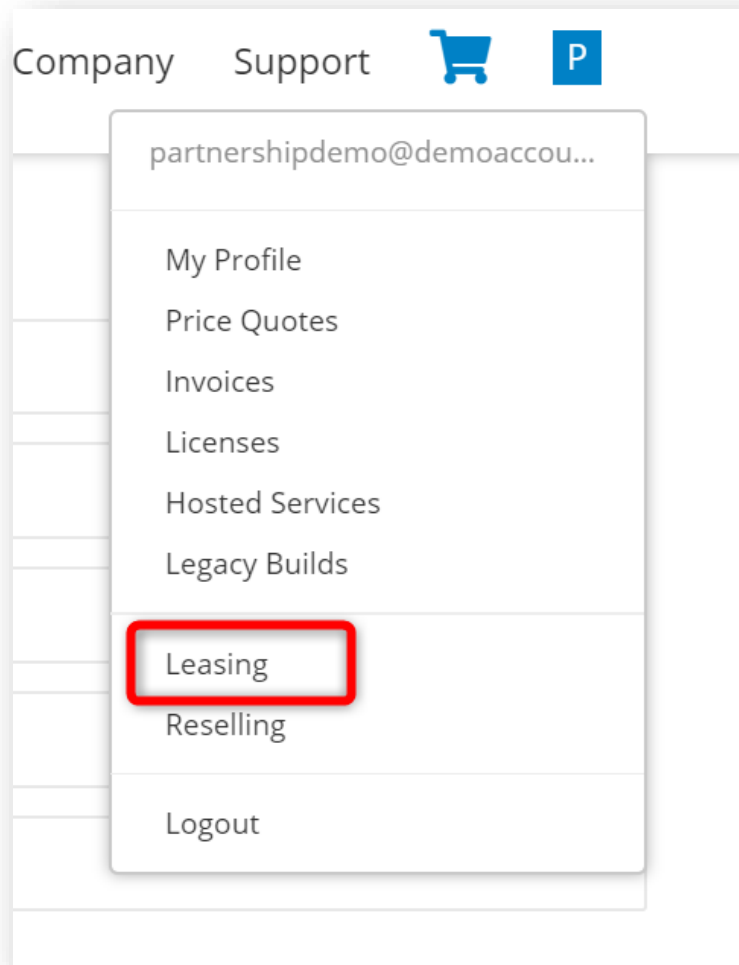
3. On the Leases page, click **Start Lease**.
4. A modal will pop up where you can select the Product Type (SmarterMail, SmarterTrack, or SmarterStats).
5. Next, select the specific Product.
6. Once you have selected the product, more options will become available. This is where you can select any add-ons (if applicable) and send the license key to the customer's email address.
7. Once you have selected all your options and the required fields are filled out, click **Start Lease**.

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*Note: Leases can be stopped or upgraded by selecting the Lease ID in the Leases section. This will display the license, product, and machine name. Click **Modify** to make changes to the leased license. Click **Stop Lease** to stop a lease.*

Modify an Existing Lease License

When you modify a lease, you can:

- Upgrade a license to the Enterprise edition
- Downgrade a license to the Professional edition
- Upgrade the number of mailboxes/agents/sites
- Downgrade the number of mailboxes/agents/sites
- Start an add-on lease
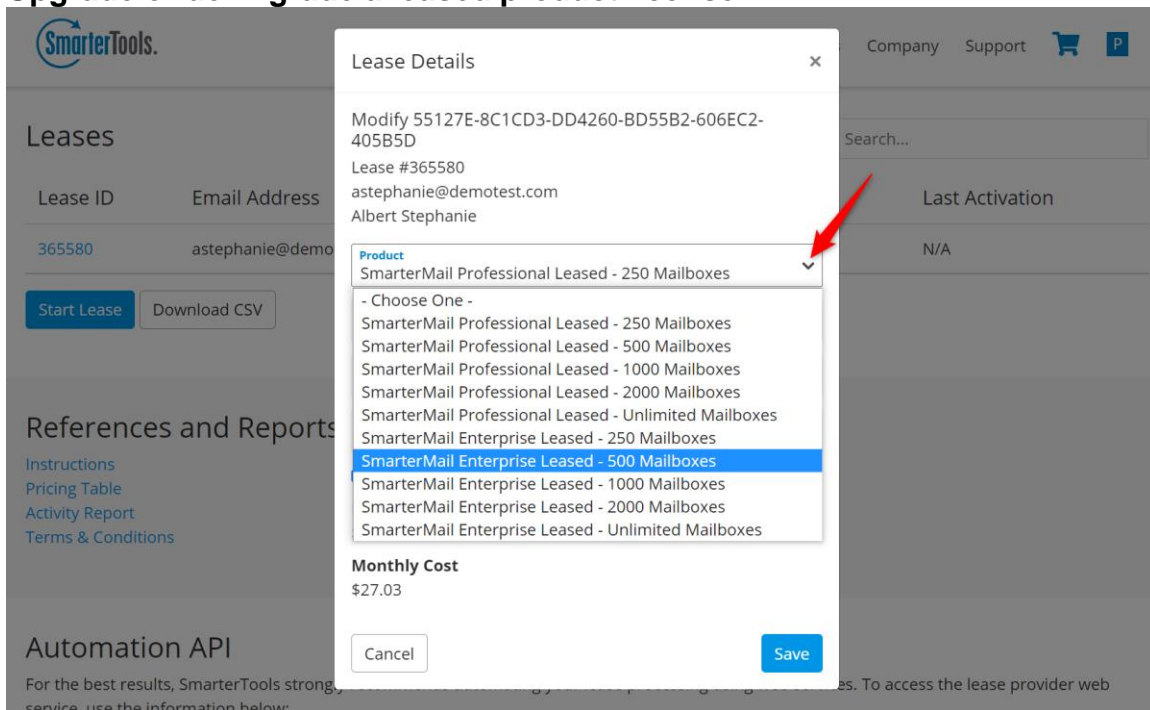
Follow these steps to modify an existing lease license:

1. Log into the Lease Provider account on the SmarterTools website: https://www.smartertools.com/.
2. Hover over the account menu icon and click on **Leasing**.
3. In the Leases section, a list of your current leases will load. To search for a lease, you can use the following criteria:
   a. Lease ID
   b. Email Address (full or partial)
   c. License Key
   d. Server Name (that the key is activated on)
4. Click on the **Lease ID** to open the Lease Details modal.
5. In the Lease Details modal click **Modify** and the modal will expand with the modification options.
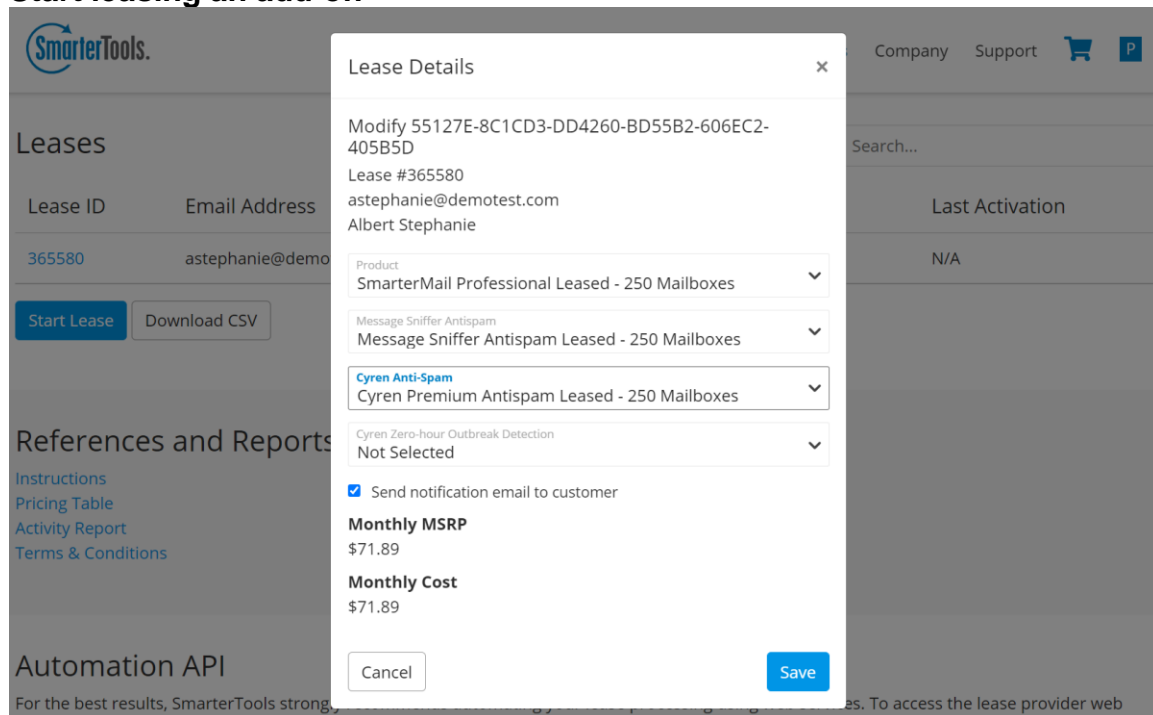
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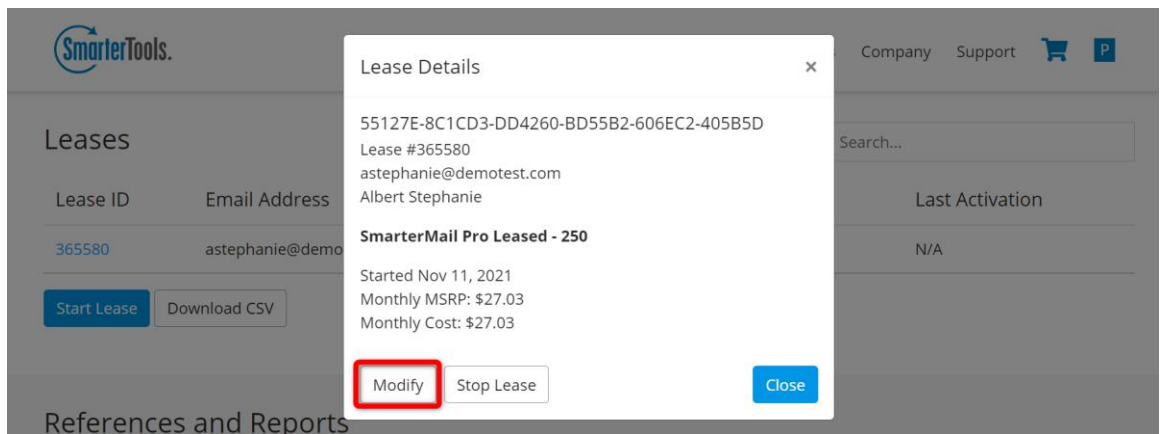
6. In the new options you can select a different product (ex: changing SmarterMail Professional 250 mailboxes to Enterprise 500 mailboxes), add add-ons, or both.
7. After you've made all your changes click **Save**.

Upgrade or downgrade a leased product license

Start leasing an add-on

Stop a Lease License

When a lease is no longer needed, it is the responsibility of the Lease Provider to ensure the lease is stopped. You will continue being charged for leases that have not been stopped, even if the license is no longer active on a server. Therefore, it is important to stop any leases that are no longer being used.

Follow these steps to stop a lease license:

1. Log into your Lease Provider account on the SmarterTools website: https://www.smartertools.com/.
2. Hover over the account menu icon and click on **Leasing**.
3. In the Leases section, locate the lease you would like to stop, and click on the **Lease ID**.
4. The Lease Details modal will open.
5. In the modal click **Stop Lease.**
6. The modal will display a confirmation about stopping the lease.

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7. Click **Stop Lease** again if you would like to continue with stopping the lease.
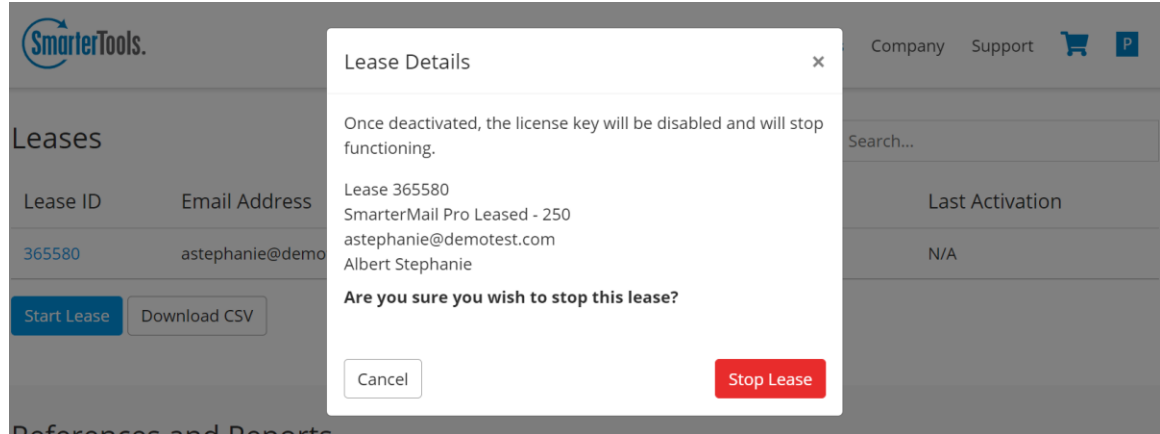
8. After clicking to stop the lease the modal will show a confirmation.
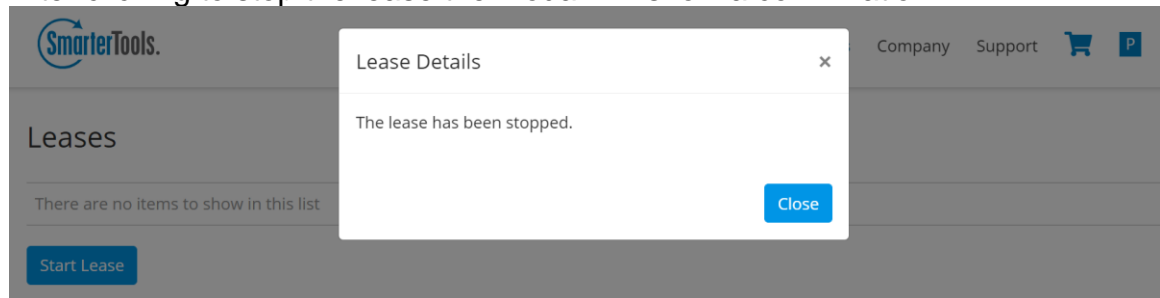
Automate Lease Management with the API

Although Lease Providers can manually start, modify, or stop leases for products and add-ons, we strongly encourage automating these processes using the API. The API will enable partners to include leasing options in their online shopping cart or allow customers to make changes to their leases without delay.

To learn more about using web services to automate lease management, please refer to the **Automation API** section of the Leasing page.