



SmarterTools Partner Program User Guide

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Introduction

Welcome to the SmarterTools Partner Program. This document will help you navigate the Reseller section of your account on the SmarterTools website. Below you will find instructions on how to purchase new products, assign a license, modify an existing license, and purchase 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.

Reselling Account

The “Reselling” section under your account will allow you to purchase licenses and add-ons, assign licenses to customers, and renew or reinstate Maintenance and Support for existing licenses. You can also see, and download, a list of customers you have resold to.

Invoices

As a Reseller, you can pay on order or pay a monthly summarized invoice. Partners can view and pay summarized invoices on the Invoices page of your account on the SmarterTools website. You can view and pay invoices, download invoices as a PDF, or email invoices on this page.

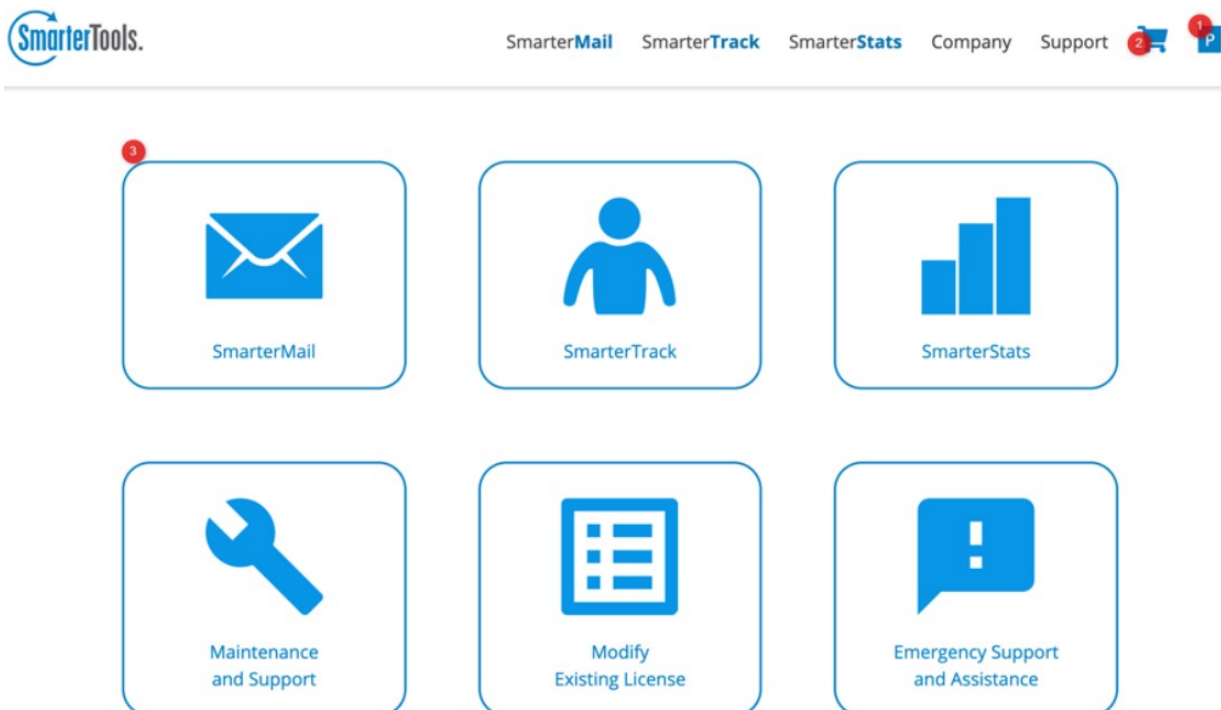
The top section (Unpaid Invoices) of the Invoice page will have a list of any unpaid summarized invoices. The second section of this page (Invoices) will have a list of all invoices whether they are summarized or non-summarized and paid or unpaid. Paid and unpaid summarized invoices will say “Summary Invoice” in the Notes column of the list of invoices. If you click on an unpaid invoice that will be included on a summary invoice, there will be a note stating, “This invoice will be summarized in the monthly summarized invoice and does not need to be paid immediately.”

Reselling

Purchase a New License

Follow these steps to purchase a new license:

1. Log into your Reseller account on the SmarterTools website: <https://www.smartertools.com/>
2. Click on the Shopping Cart icon.
3. Click on the icon for the product you are purchasing.



4. The next screen will list your selection and give you the option to choose the edition, the number of mailboxes/agents/sites, and add related products such as add-ons.
5. When you are done making your selections, click Add to Cart.

SmarterMail Enterprise - 500 Mailboxes

Enterprise Edition		change
500 Mailboxes	\$899.00	change
Message Sniffer / Cyren Bundle	\$798.00	change
Cyren Zero-hour Outbreak Detection	\$399.00	change
25 EAS Mailboxes	\$249.00	change
MAPI / EWS	\$349.00	change
<div>Back Add to cart Total: \$2,694.00</div>		

6. The next screen will list the summary of your transaction and give you the option to continue shopping or checkout. If you are done shopping, click Checkout. (Any applicable Reseller discounts will be applied at this time.)

Shopping Card

Product	Price
<div>SmarterMail Enterprise - 500 Mailboxes</div> <div>INCLUDES: 12 months of Maintenance and Support -- valid until November 23, 2022</div> <div>Cyren Premium Antispam - 500 Mailboxes</div> <div>Message Sniffer - 500 Mailboxes</div> <div>Cyren Zero-hour Outbreak Detection - 500 Mailboxes</div> <div>Exchange ActiveSync - 25 Mailboxes</div> <div>MAPI / EWS - 500 Mailboxes</div>	<div>\$2,694.00 Remove</div> <div></div>
Discount	-\$808.20
<div>Continue Shopping Checkout Total: \$1,885.80</div>	

7. Complete the required billing information and click Next.
- a. As a reseller you have the option to be invoiced for the purchase or pay on order. At the beginning of each month, you will receive a summary invoice for all purchases made the previous month.

Checkout

Choose One

New Credit Card

Card number *

Security Code *

Name on Card *

Expires MM

11

Expires YY

19

☐ Save credit card in my account

Billing Address

Country

Address

Apt, suite, etc.

City

State

N/A

Postal code

Back

Continue

Checkout

Choose One
Send Invoice

By checking the "I AGREE" box displayed as part of the ordering process, you agree to remit payment for any products or services purchased with SmarterTools within 30 days. Failure to remit payment within this time frame may result in the deactivation of your products or services.

If you are entering into this agreement on behalf of a company or other legal entity, you represent that you have the authority to bind such entity to these terms and conditions, in which case the terms "you" or "your" shall refer to such entity.

If you do not have such authority, or if you do not agree with these terms and conditions, you must select a different payment method or discontinue this order.

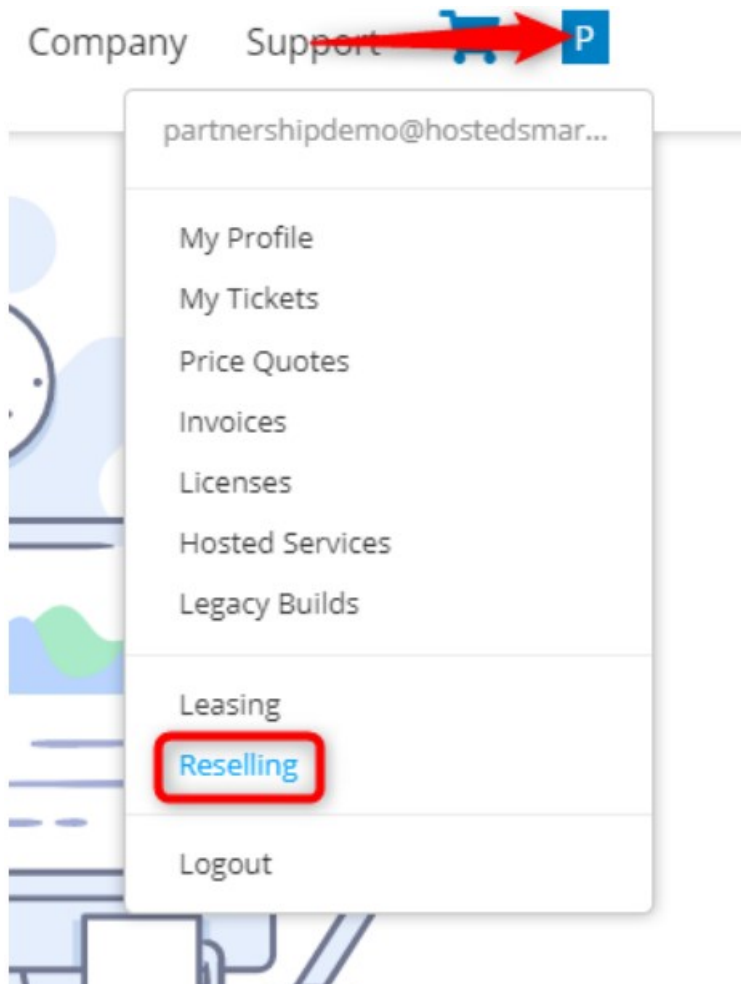
☒ I AGREE to the terms and conditions above

Back
Continue

Assign a License

Once you have completed a purchase you will need to assign the license to the customer's email address. If a license has not been assigned, the customer will NOT be able to activate the license key on their installation

1. Log into your Reseller account on the SmarterTools web site: <https://www.smartertools.com/>
2. Hover over the account menu icon and click on Reselling.



3. There are three ways you can assign a license.
 - a. Under the Unassigned Products section click the Assign License button.
 - b. Under the Unassigned Products section click on a product in the list, then click the Assign License in the modal
 - c. If you have customers listed under the Reseller Customers section, you can click the Assign License button

there. If there are no customers listed you will not see this option.

SmarterTools.

Reseller Customers

There are no items to show in this list

Unassigned Products

Product

SmarterMail Enterprise - 500 Mailboxes
ActiveSync 25, Cyren Antispam 500, Cyren AV 500, MAPI / EWS 500, Message Sniffer 500

SmarterTrack Professional - 2 Agents

SmarterMail Professional - 250 Mailboxes

Assign License Download CSV

Assign Product

Item to Assign
SmarterMail Enterprise - 500 Mailboxes (purchased 11/23, 2021)

E5748A-140FD2-2A4FD9-8A59CD-9100F0-CDA59C
SmarterMail Enterprise - 500 Mailboxes
ActiveSync 25, Cyren Antispam 500, Cyren AV 500, MAPI / EWS 500, Message Sniffer 500

Email Address
customer@email@company.com

Confirm Email
customer@email@company.com

Double check this form!
By clicking the Assign License button, you agree to transfer all rights and property of the product to the owner of the email address you entered. All terms are outlined in the current reseller agreement.

Cancel Assign License

Company Support

Search...

Purchased	Invoice
Nov 23, 2021	2110170501
Nov 23, 2021	2110170500
Nov 23, 2021	2110170499

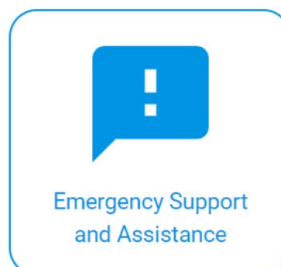
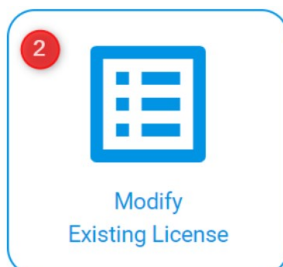
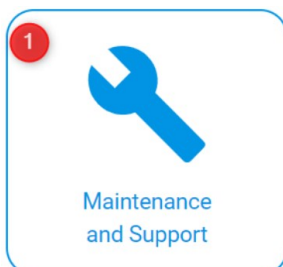
4. Select the appropriate product from the list in the Assign Product pop up.
5. Type the email address of the customer and click Assign License. Note: SmarterTools licenses cannot be re-assigned. Double check the email address entered to ensure products are properly assigned.

If the customer you are assigning the license to already exists in the SmarterTools database, they will receive an email with the license key and can activate their product immediately. If the customer does not exist in the SmarterTools database, an account will automatically be created for them, and they will receive an email with their username, password, and license key(s).

Modify a License

Resellers can upgrade the edition, number of mailboxes/agents/sites, or renew/reinstate Maintenance and Support on licenses for themselves and/or their customers by modifying a license.

1. Log into your Reseller account on the SmarterTools web site: <https://www.smartertools.com/>
2. Click on the Shopping Cart icon.
 - a. If you are renewing/reinstating Maintenance and Support (M&S) for an existing license, click on Maintenance and Support (1).
 - b. If you are upgrading the edition or number of mailboxes/agents/sites, click on Modify Existing License (2).



3. On the license page, select whether this purchase is for Personal Licenses or Resold Licenses.
 - a. If you are making a purchase for a Resold License, enter the license key and click Go. Then click the Select button next to the license information.
 - b. If you are making a purchase for your own license, click the Select button next to the license information.
4. Complete the purchase process. (See steps 5-7 under "Purchase a New License").

Once you have completed the purchase, you will receive an invoice and the customer will receive an email letting them know their license has been modified. If a change was made to the license’s edition or number of mailboxes/agents/sites, the installation must be reactivated.

Purchase Add-ons

To purchase an add-on, follow the same steps as you would for modifying a license. Once the purchase is complete, the installation must be reactivated in order to gain access to the add-on immediately.


Automate Reselling with the API

Although Resellers can manually make purchases, we strongly encourage partners to use the automated web services to include products in their shopping carts. This will allow customers to purchase licenses and add-ons, upgrade licenses, or renew/reinstate Maintenance and Support through the shopping cart on your own website, and new purchases can be automatically assigned to the customer.

To learn more about using web services to automate your reselling options, please refer to the Automation API on the Reselling



Documents / Resources

	SmarterTools Partner Program [pdf] User Guide Partner Program
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References

- [📧 Email Server, Help Desk and Web Analytics Software](#)