

Quick Start Guide – Sendio Hosted

This Quick Start Guide will help get your new Sendio Hosted Service instance up and running quickly. It assumes you have experience configuring email servers and firewalls. Read this entire guide to understand this process. In addition to this Quick Start Guide, additional documentation is available at <https://sendio.com/support/documentation-and-support-tools/>.

Overview

With the Sendio Hosted Service, you can manage your entire email protection solution from a web-based interface, with no on-site hardware to manage. Your solution is serviced via a Tier 3 data center, with highly redundant hardware, power, and internet bandwidth. Inbound emails route through your Sendio hosted instance automatically via an MX record entry in public DNS. Outbound emails route through Sendio (if desired) via a Smarthost or relay setting in your mail system. All Sendio hosted customers are provided a dedicated public IP address for email flows for maximum control.

This Quick Start Guide covers the following steps.

1. Determining the IP address, usernames and passwords of various systems and accounts
2. Modifying your firewall settings
3. Verifying SMTP communications
4. Using the web interface to configure directory services
5. Entering your mail server IP or hostname into the System>Internal Mail Host field
6. Set “Sender Host Addresses” for outbound email
7. Setting the directory auto-synchronization schedule
8. Granting Administrator access to one or more users
9. Change the sysconfig password
10. Setting Contacts
11. Routing email traffic through Sendio
12. Enable the Queue Summary Email (Optional)

Note: Some steps in this guide require you to have SSH connections to Sendio. You can download the free PuTTY software client from www.putty.org to your computer, and then use it for SSH connections to Sendio as directed in this guide.

STEP 1: IP ADDRESSES, ACCOUNTS AND LOGIN INFORMATION

Gather the following information:

- Public IP address of your internal mail server or hostname of cloud-based email system
- Public IP address of your internal directory server (Note: Your directory server may not be accessible on a public IP address and this will need to be changed on your firewall. For more information see “Modifying Your Firewall Settings”). If using Azure AD, see Azure Active Directory Setup in Sendio here; <https://sendio.com/support/documentation-and-support-tools/>
- Username and password for accessing your directory server for Sendio LDAP synchronization (a user account with read-only access to all user and groups, and a password that does not expire are required)
- Login URL, Administrator Login ID and password for your Sendio Hosted instance (provided after your purchase)
- Host name of your Sendio Hosted instance, which is used for the MX record and Smarthost (provided after your purchase)

STEP 2: FIREWALL MODIFICATIONS

Certain ports must be opened to ensure proper operation as shown below.

Port	Direction	Origin	Destination	Usage
TCP 25	In	Public IP of your Sendio Hosted Instance	Mail server Public IP	Incoming email from Sendio data center
TCP 3268 (see Notes 1 and 2)	In	Public IP of your Sendio Hosted Instance	Directory server Public IP	User import to Sendio, user single sign-on support
TCP 389 (see Notes 1 and 2)	In	Public IP of your Sendio Hosted Instance	Directory server Public IP	User import to Sendio, user single sign-on support
TCP 636 (see Notes 1 and 2)	In	Public IP of your Sendio Hosted Instance	Directory server Public IP	LDAP over SSL; automatic user import to Sendio, user single sign-on support

Note 1: Only one of the three TCP ports specified (3268, 389 636) is required for access to your internal directory server. TCP port 3268 is the most common for Microsoft Exchange. TCP port 636 will likely involve extra provisioning steps coordinated with Sendio Technical Support.

Note 2: If you use a cloud email hosting service Such as Microsoft Office 365 or Google Apps, you may not have an onsite Directory server. Sendio can sync directly with Office 365 Azure Active Directory, Technical Support can assist with any directory setup issues.

STEP 3: VERIFYING SMTP COMMUNICATIONS

1. Launch the Sendio SSH interface and login to your hosted instance
 - a. Login ID = sysconfig (Note: for this interface login is NOT sysconfig@esp)
 - b. Password = same password used for the web interface
2. Navigate to Network Diagnostics
3. Scroll down to the eMail Test section
4. In the **SMTP Server**, enter your mail server Public IP address or hostname
5. In **To** enter a valid email address for your domain
6. Click **Run Diagnostic Test** and confirm that email is received by the person whose email address you entered in the **To** field in the previous step

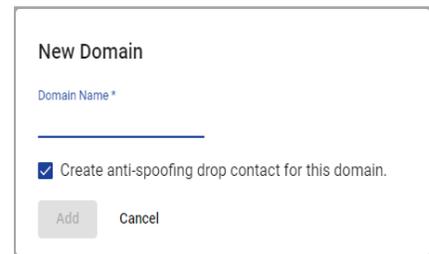


STEP 4: DIRECTORY SERVICES

1. Open a web browser and navigate to your Sendio web interface <http://hostname.sendio.com>
2. When the dialog box opens, type **sysconfig@esp** and the provided by Sendio
3. In the Sendio web interface, click the **Domains** menu option to show the **Domains** page. Click the + sign on the far right of the screen to open a popup window. Enter the domain to be protected by Sendio (your domain(s) name) and click the Add button to add the domain(s) to your Sendio instance. Repeat for multiple domains
4. Create a Synchronization User for your directory
5. Using the Sendio web interface, Click the **Directories** menu option to show the **Directories** page, then click the + sign on the far right to create a new directory. You have many options as to the type of directory to sync with to add user accounts to Sendio. The most used are Microsoft Active Directory, Azure Active Directory, and the Sendio Onboard Directory. Depending on what directory type you choose, Sendio can provide detailed documentation for the configuration of each directory type.
6. Verify that your firewall is configured to allow Directory sync if using Microsoft Active Directory. The default port is 3268, while other LDAP servers' default to port 389.
7. Once the directory is fully configured, you will click on the Sync button to synchronize the Directory with your Sendio system to create the user accounts in Sendio. If synchronization



(example,
password



succeeds, Click on the Accounts tab. Within this section all users and distribution groups in your directory should be displayed.

Note: After your directory is synced, user single sign-on to Sendio will be functional. Any user can then log in to Sendio using the same credentials the user used to log in to their computer and email account (e.g., email address and network password).

STEP 5: SYSTEM OPTIONS (MAIL SERVER SETUP)

Enter your mail server public IP address or hostname, organization name and preferred time zone.

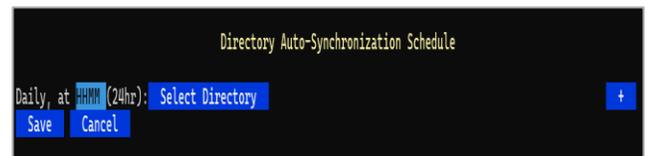
1. Using the Sendio web interface, click the **System > Options** tab.
2. Set the **Internal Mail Host** to the public IP of your mail server or Office 365 hostname.
3. Set the **Organization Name** to the company name that will be used for the SAV messages.
4. Set the **Preferred Time Zone**
5. Save your settings.

STEP 6: SENDER HOST ADDRESSES FOR OUTBOUND EMAIL

1. Log in to the Sendio console of your hosted instance via SSH.
2. Your console login ID is **sysconfig** (Note: for this interface, the login is not sysconfig@esp). The login password is the same as the web interface.
3. After logged in, navigate to **Network Configuration**.
4. In the **Sender Host Addresses** field, enter the outbound public IP address(es) of your organization's outbound emails.

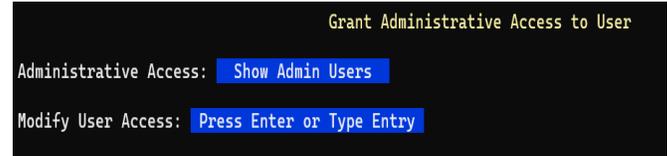
STEP 7: SET AUTOMATIC DIRECTORY SYNCHRONIZATION SCHEDULE

1. Login to the Sendio console of your hosted instance via SSH.
2. After logged in, navigate to **Directory Management**.
3. Arrow over to **Select Directory** and press Enter. Press Enter again to accept default selection.
4. Arrow over to **HHMM** and remove all the letters. Enter time for synchronization in 24 hour format (i.e. 2200 for 10PM).
5. Arrow over to the + sign and press Enter to add new synchronization schedule.
6. Arrow down and click **Save** to save your settings.



STEP 8: SET ADMINISTRATIVE USER RIGHTS

1. Using the Sendio console interface in **Directory Management** under **Grant Administrative Access to User**
2. Arrow over to **Press Enter or Type Entry**. Enter users last name and press Enter.
3. Select the appropriate user with the space bar. Tab to highlight **Select** and press Enter.
4. Arrow down to **Grant Full Admin Access** and press Enter.
5. Save your settings and repeat for any additional administrators.



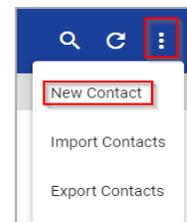
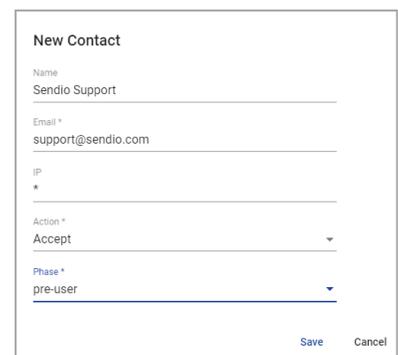
STEP 9: CHANGE YOUR SYSCONFIG PASSWORD

1. If desired, you can change the sysconfig password provided to you by Sendio. Navigate to the **System Configuration** section in the Sendio console interface.
2. Under '**sysconfig**' **User Password**, enter the new password and click Save to update

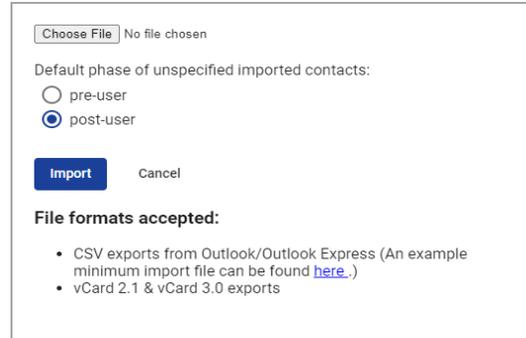
Note: The password must be between 5 and 8 characters and contain both letters and numbers.

STEP 10: SET CONTACTS

1. In the Sendio web interface, click **System > Contacts** to create a new system contact.
2. To create a new contact, click on the three dots on the right side of the screen then select **New Contact**.
3. Create an **Accept** contact to accept all email from Sendio Support, use the email address support@sendio.com.
4. Review the Contact page and confirm that there is a **System Drop Contact** to counter spoofing (incoming email with sender addresses belonging to your own domain). This was created when you entered your domain name in the **Domains** section.
5. If desired, you can build the initial list of company contacts. In most organizations, an existing list of email contacts can be imported in to Sendio. From accounting applications to CRM to an Exchange Public Folder, these email addresses can be exported to a CSV file that can be imported into Sendio from the Sendio web interface in **System > Contacts**. Click the three dots on the upper right of the screen then select **Import Contacts**.

- In the pop-up window you will use **Choose File** to browse and find the CSV file on our local computer to import into Sendio. The default phase for the new contacts will be post-user but you have the option to change the phase before importing. Once the file is selected, click **Import** to create the new System Contacts.



The screenshot shows a dialog box titled "Choose File" with the text "No file chosen". Below this, it asks for the "Default phase of unspecified imported contacts:" with two radio button options: "pre-user" (unselected) and "post-user" (selected). There are "Import" and "Cancel" buttons. At the bottom, it lists "File formats accepted:" including "CSV exports from Outlook/Outlook Express (An example minimum import file can be found [here](#).)" and "vCard 2.1 & vCard 3.0 exports".

STEP 11: SPF RECORD

If your email domain currently has an SPF record in public DNS, we highly recommend explicitly adding your Sendio hostname to the SPF record 24 hours prior to routing outbound email through Sendio. For example, if your current SPF record is “v=spf1 mx -all”, add an a: record with your Sendio hostname (example: v=spf1 mx a:domainname.sendio.com -all). www.mxtoolbox.com is a helpful resource for checking your current SPF record in public DNS. If you need help to define or edit your SPF record, contact Sendio Support with questions.

STEP 12: ROUTE EMAIL TRAFFIC THROUGH SENDIO

- For inbound traffic routing your MX record will need to be changed to the host name of your new Sendio hosted instance (for example, hostname.sendio.com). Log into your authoritative DNS server or contact your DNS provider to make the change.
- Confirm that your MX record has been changed and is visible in public DNA by using www.mxtoolbox.com. Enter your domain name and click the **MX Lookup** icon.
- Use the **Global Views/View Inbound** in the Sendio web interface to verify that traffic is flowing. It may take 1 hour or more until you see email flowing.
- Send a final test from an external account. When you receive a Sender Address Verification (SAV) email, reply to it, and verify that the test message is released from Sendio to your inbox.
- Configure your mail system to route outbound email through Sendio. You will setup your mail system to route outbound email through a smart host to your Sendio host name (for example hostname.sendio.com).

Note: If desired, you can route outbound email through Sendio for several days prior to routing inbound email. Outbound email sent by any user results in the email recipient becoming a Contact for that user automatically, without requiring the contact to be pre-imported.

For assistance on how to smart host your mail system, refer to the support documentation on the Sendio website <https://sendio.com/support/documentation-and-support-tools/>



STEP 13: ENABLE THE DAILY OR TWICE-PER-DAY QUEUE SUMMARY EMAIL (OPTIONAL)

If desired, you can enable the Sendio Queue Summary email for all users or individual users. This email is sent directly to a user's inbox and summarizes the held email messages for the past 28 hours. Users can easily Accept and Drop messages via https links within the email. See the "Administration Manual" (Section 12) in the Support Documentation section of our website <https://sendio.com/support/documentation-and-support-tools/>

Congratulations! Your Sendio hosted instance is now configured successfully. For additional information, visit our documentation page <https://sendio.com/support/documentation-and-support-tools/> or submit a support ticket by sending an email to support@sendio.com.