
Setting up a new Account in Proofpoint Essentials

Situation	You are a new Customer that needs to be set up in Proofpoint Essentials.
Solution	<p>This article provides an overview of the setup for a new account with links to detailed configurations for a new account. It will specifically address:</p> <ol style="list-style-type: none">1. Create Account Using New Account Wizard - For Partners Only2. Configure All Inbound Domains3. Configure Outbound Sending Servers - (If Using Essentials For Outbound)4. Create Users / Functional Accounts5. Configure DNS settings

Required Information Needed During Set Up:

• Company Information

- Company Name
- Email Domains - All domains using this account for Essentials services
- Company Address, Phone Number, Website
- Contacts:
 - Admin name and email address - Used for contact, notifications, Administration of service
 - Technical name and email address - Used for system notifications / service communications, Administration
 - Billing Contact - Used for billing / renewal notifications
- All User names / email addresses / Aliases - To be used for mail routing (Can be imported via CSV or Synced via AD / Azure directory.)
- All non-user email addresses - To be used for mail routing (Distribution Lists, Resources, Printers etc.)
- Number of Licenses needed.

• Technical Information

- IP's for all sending servers, applications, services etc. if routing mail outbound through Essentials
- Access to domains DNS host registration to update txt files and MX records.



- Proofpoint IP's, MX, SPF, Smarthost and other settings. See [Connection details](#) for these.

Summary of Steps:

1. Create Account Using New Account Wizard (For Partners Only).
2. Configure All Inbound Domains.
3. Configure Outbound Sending Servers (If Using Essentials For Outbound).
4. Create Users / Functional Accounts.
5. Configure DNS settings.

Detailed Steps:

Create Account using New Account wizard: (Only used if your a Partner)

1. Navigate to **Administration > Customer Management > Customers > Add A Customer**
 1. Account Type: Channel (Partner account) or Organization (Customer account)
 2. Select License: Beginner, Business, Advanced, Professional (See [Licensing Options and features](#))
 - a. Add number of Licenses.
 3. Add Company Name, Address, Phone, Website.
 4. Add Initial Domain and the Administrators First and Last Name, Phone, Email. (Note: this email address MUST be part of the initial domain being added).
 5. Review Settings and click either **Purchase** or **Start 30 day trial** to complete account creation
 6. Verify Initial Domain. You can skip this for now by choosing **Save - Verify Later** ([Verification Steps](#)).
 7. Accept EULA.

Configure all inbound Domains:

- If using O365, Skip this section and Section 3 and refer to: [Configuring Office 365 for Proofpoint Essentials](#)
- If using GSuite, Skip this section and Section 3 and refer to: [Configuring G Suite \(Google Apps\) for Proofpoint Essentials](#)

Navigate to **Administration > Account Management > Domains > Domains**.

1. Edit Initial domain by clicking edit icon to the right of the domain
 - a. Change domain purpose to *Relay*.
 - b. Add Primary Destination and any desired failover destinations

This is your Mail Servers IP or DNS name for Proofpoint to hand off mail. Failovers are optional but can help if your primary route becomes unavailable



2. If you opted to save domain verification for later in the Setup Wizard on Step 1, see [Verification Steps](#) to complete verification
3. Repeat for all additional domains using Essentials services by clicking **New Domain** on the domains page and adding additional domains.

You may optionally leave these as Management domains until you are ready to Verify and enable Relaying for them

4. Ensure your firewall will allow all Proofpoint IP's through on Port 25. You can find all our IP's on the [Connection details](#) page.

Configure Outbound Sending Servers (if using Essentials for outbound):

1. Navigate to **Administration > Account Management > Domains > Sending Servers**
 - a. Click **New Sending Server**.
 - b. Add any public IP addresses / ranges for servers that will be sending outbound mail to Proofpoint.

Proofpoint can accept CIDR notation for ranges to /24. We do not accept lower notations for /20 or /18 etc.
 - c. Repeat for all Mail Servers and any applications, services, or devices sending outbound through Proofpoint for any of your domains .
2. Add the Proofpoint SPF record to your existing DNS SPF settings. See [Connection details](#) for your specific setting.

Add to your existing SPF and do not replace any current entries.

3. You must also configure your Mail System to send external mail to Proofpoint when ready.
 - a. Point all external mail to the Proofpoint Smarthost - See [Connection details](#) for your specific setting.

You may configure this in preparation for the switch, but **DO NOT** enable this in your mail system until the final step in section 5 is reached or outbound mail will be rejected by Proofpoint.

Configure Users / Functional Accounts

Choose only ONE of the Below methods:

By default, Users will receive a Welcome email as soon as added. To disable this, go to **Administration > Account Management > Notifications** and disable the *Welcome Email* checkbox. You have the option to use [Mass Update](#) on the Users List to send this later if desired.

The following five methods are available to select from:

- Manual User Creation
- CSV Import
- Active Directory Sync
- Azure Directory Sync



- SMTP Discovery

Manual user Creation

- Users - Refer to [How To Add & Manage Users](#)

User Accounts can fully manage things like Personal Block / Safe Senders, personal Digest settings, Portal Access, Personal Filters, Mail Logs, Aliases etc. These are **Licensed Accounts**

- Functional Account - [Adding Functional Accounts Manually](#)

Functional Accounts are for mail routing to non-user mailboxes, Distribution Lists, Groups etc. and cannot access the portal. They have limited options for account preferences. Only an Admin can manage certain preferences i.e, digests, Mail Logs, Filters etc. **These are NOT licensed accounts**

CSV Import

- Refer to [Import from a CSV File](#)

Active Directory Sync

- **EXCHANGE ONLY** - Refer to [How to enable Active Directory Sync to Proofpoint Essentials \(LDAP Discovery\)](#)

Azure Directory Sync

- **O365 Only** - Refer to [Azure Active Directory Sync Guide - New API Version](#)

SMTP Discovery

This option allows Proofpoint to Discover new addresses being used for inbound and outbound mail and create temporary accounts for you to accept as full Users during the temporary period. If using this. No mail will be rejected by Proofpoint for any address being sent to or from your domains. Refer to [Importing users with SMTP Discovery](#)

Configure DNS Settings

All Previous Steps **MUST** be fully completed before this final step.

1. Approximately one hour before you switch your MX to Proofpoint do the following:
 - a. Navigate to **Administration > Account Management > Domains > Domains section**
 - b. Toggle the *Relay Button* to on (move to the right position) for all domains you will be switching MX for.
2. Wait **ONE HOUR** for settings to propagate.
3. Add Proofpoint MX Records as the lowest number preference to your DNS MX record. See [Connection details](#) for your MX settings.



Once you are comfortable that Mail Flow is working as expected, you should remove the old MX's that are directed directly to your mail server.

4. Check the *Log Search* soon after switching MX to confirm mail is routing through Proofpoint. The details icon to the right of any message log will provide valuable insight into quarantines, blocks, deferrals etc. if needed for troubleshooting.
5. Once you are comfortable with inbound mail flow, you may now enable your mail server to send external outbound mail to the Proofpoint Smarthost as well.

Additional Resources - Articles for account Preferences, Spam Settings, Common Tasks etc.

- [Understanding Email Logs](#) - Review and Release Inbound and Outbound messages
- [Adjusting your spam settings](#) - Tweak default settings to match your organizations needs
- [Digest settings](#) - Sending and Options for Users email digests
- [Setting Up Sender Lists](#) - Block / Allow specific Addresses, Domains, or IP's
- [About filters](#) - Creating custom inbound / outbound filters to allow / quarantine specific messages
- [Emergency Inbox](#) - Access inbound mail via Proofpoint portal when your mail sever is unavailable
- [URL Defense](#) - URL Rewriting and Sandboxing links. Available for Business, Advanced, Professional packages
- [Instant Replay Feature Explained](#) - Resend any message for up to 30 days. Available for Business, Advanced, Professional packages
- [Email Encryption](#) - Available for Advanced and Professional packages only
- [About Email Archive](#) - Available for Professional packages only

