RMAIL FOR SALESFORCE

Email Encryption | Registered Email™ Proof | E-Signatures

RMail® for Salesforce adds an all-in-one toolkit to track, prove, e-sign, encrypt, and more, for emails sent from Salesforce.com, backfilling message status data and e-delivery evidence into the Salesforce record.

RSign® for Salesforce is a sister application that can provide more functionality around sending documents, templates, and forms for recipient fill and e-sign, backfilling form field, e-sign status data and e-sign evidence into the Salesforce record.

This guide focuses on RMail functionality. *While RMail includes e-signature functionality, if you need more advanced functionality for e-signatures and forms, refer to the RSign for Salesforce guide. These two applications together are a major update to the original RPost for Salesforce application*.

Customers worldwide have been using RMail and RSign for more than a decade, using their award-winning features:

- Email Encryption Simplified for Privacy Compliance
- Registered Email™ Certified Open Tracking and E-Delivery Proof
- E-Signatures and Forms
- Secure File Sharing, and more.

WHAT'S NEW

- Additional sending features.
- More e-delivery analytics back-filled into Salesforce
- New automation rules to force features based on message template or field data.
- More options to backfill Registered Receipt™ email proof and message status information into the Salesforce record.

WHY GREAT?

More Enjoyable Productivity:

- Brings the main RMail service features – **Registered Email™ certified e-delivery proof**, dynamically simplified **email encryption**, and **e-signatures** -- right into their comfortable Salesforce.com email interface.

- Encryption must be easy, especially for the recipient, to encourage use and reduce risk. Not all encryption services are the same; too burdensome means little used, more risk.

- Registered Email proof of delivery returns Registered Receipt certified proof records. Salesforce makes it easy for teams to share access to these proof records as needed.

- This is critical with today's more sophisticated privacy regulations, client demands for privacy, and hacker tactics.

  FAQ: Why RMail Encryption vs. Others?

  Dynamically simplifies sender and receiver experience.

  *Customers with a Microsoft email offering (e.g. Office 365 E3, E5) choose RMail for its email encryption because of the elegant user experience, **especially for the recipient**, and for the Registered Receipt™ proof of privacy compliance, e-delivery proof, and tracking record.*

  *Other encryption services like Microsoft encryption require the recipient to click links, register, and log-in to retrieve the encrypted email. This causes a high un-opened rate as receivers get frustrated. **RMail encryption is elegant for the recipient** as RMail always delivers direct to the recipient inbox without any recipient registration or download requirements.*

FAQ: Why RMail Registered Email Proof vs Outlook Receipt or Salesforce Tracking?

Registered Email™ certified e-delivery services track delivery and message opening regardless of recipient or system settings *and provides an audit trail forensic record that can authenticate content and uniform timestamps.*

- *By contrast, Outlook and other simple read receipts only work if the recipient has Outlook and has the right settings on, and even if it returns a read receipt, the receipt (a) tells nothing about message content, (b) times are based on the senders computer and are not uniform, and (c) format is simple text such that it can be modified and is not an authenticatable.*
- *By contrast, Salesforce open tracking and other simple marketing connector open tracking only work if the recipient views images – for example, if the recipient views in Outlook default settings, image display is disabled at the recipient and open tracking is foiled; even if it does track opening, it (a) tells nothing about message content received, (b) times are not uniform, and (c) format is simple text such that it can be modified and is not an authenticatable record.*

FAQ: Why RMail Registered Email Tracking vs Server Logs?

Registered Email™ receipt is a self-contained record that can authenticate delivery, content and time in an easily portable format *--- simplifies the time need by IT staff and experts to process an email investigation and proving delivery of disputed email.*

- *So easy, simply forward the Registered Receipt to the other party and they then have all the data to authenticate if needed. By contrast, piecing together and packaging server logs with the record of the original sent item is challenging to do possibly months or years after the sent date, when evidence may be needed, and may be impossible to gather/authenticate.*

FAQ: Why RMail E-Signatures vs Others?

RMail e-sign simplifies sending for recipient e-signature without requiring any document preparation; or use RSign full service for form fill, and a guided signing process.

- *RMail e-signatures provide a simple option to send any document for signoff without the need to set up or prepare document fields; this reduces send time and makes e-sign an "attach-to-email-and-send" process.*
- *RMail e-signatures have a back-end option to enable signatures to be forced into certain locations based on tags placed in attachment templates.*

- *RMail e-signatures are less than half the cost of other full-service e-sign providers, with all the features needed.*

Automated Security:

- For security and compliance staff, RMail for Salesforce has powerful policy-based encryption, certified e-delivery proof and other functions, that, based on the message template or certain field data,
    - ***Recommends*** *the user encrypt, track, prove, or send for e-sign,*
    - ***Requests*** *the user to encrypt, track, prove, or send for e-sign*
    - ***Requires*** *the user to encrypt, track, prove, or send for e-sign*
- Minimizes risk of potentially embarrassing or harmful human error.

Simplified IT Experience:

- For IT departments, this combination
    - minimizes add-in complexity,
    - creates easier ways to trigger follow-on activities in Salesforce based on delivery information or e-sign status,
    - simplifies the recipient email encryption experience which minimizes calls for help to IT support staff, and
    - arms end users with e-delivery tracking and proof visibility – no need to ask IT what happened to their important email.

Shared Access to Message Status and Proof Records:

- For Compliance and Legal departments, having the certified privacy compliance records and the certified proof of timestamped content delivery records associated with the contact or account makes it easy for teams to access these records regardless of who the sender was.

HOW DO I GET STARTED? AN OVERVIEW.

Step 1. Getting Started.

1. **Install RMail for Salesforce.com**: Salesforce administrator installs ***RMail for Salesforce*** using the RMail install link.

2. **Configure**: Salesforce administrator configures ***RMail for Salesforce*** using normal Salesforce administrator options.

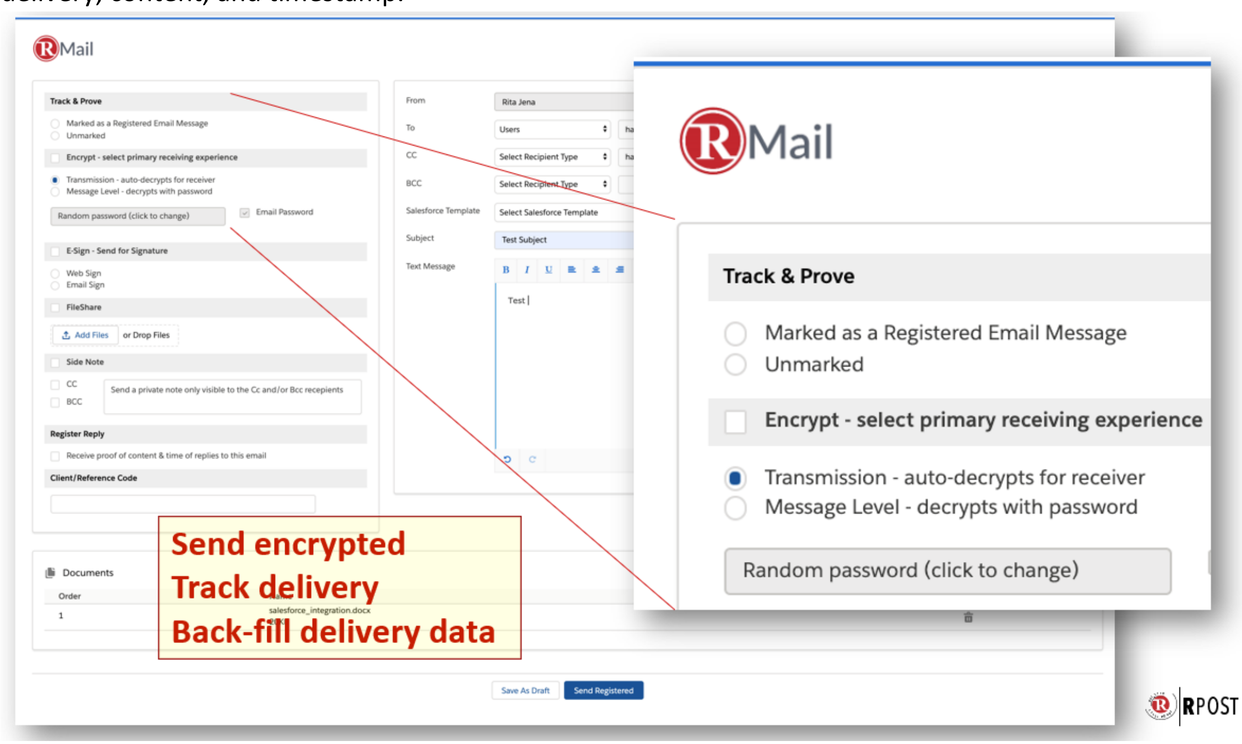
3. **RMail Account**: Each user is required to have an RMail user account. Users or Admin can register for their RMail user account within the ***RMail Configuration Tab*** inside of RMail for Salesforce (or visit rmail.com or app.rmail.com). This provides access to free accounts and testing accounts. Or, contact RMail sales for business account access and support.

4. **Users Associate RMail to Salesforce:** Using the RMail Configuration tab, users log-in one-time to RMail from within their Salesforce.com interface, using their RMail username and password.

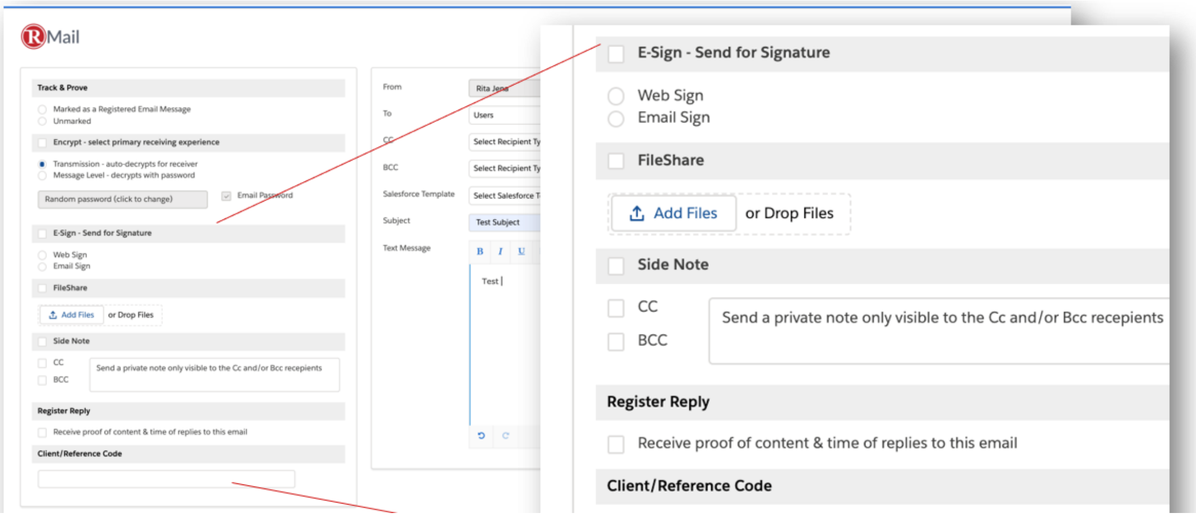
You do not need anything further to get started, for use of up to 5 messages per user per month, auto-renewing each month. For business plans, contact your RMail partner or RPost (click here).

Step 2. First Use.

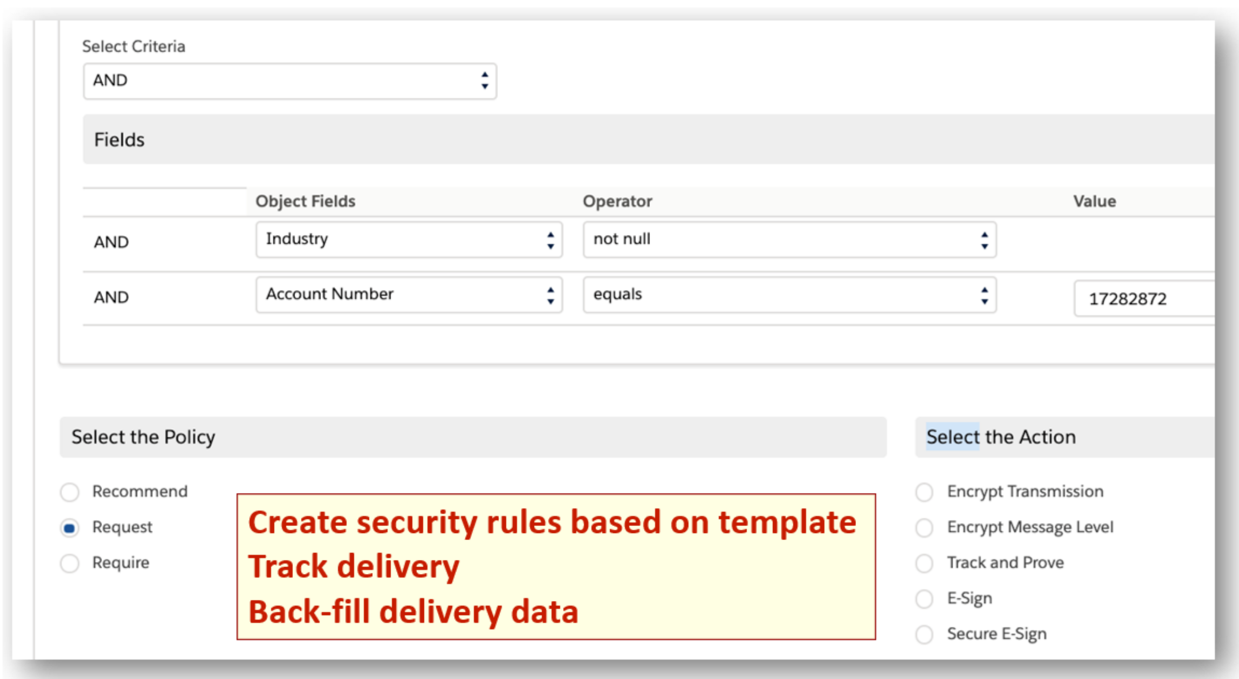
1. Once the RMail for Salesforce app is installed and users have connected (logged into) their RMail user account from within Salesforce (from the RMail Configuration tab), you will see the SEND RMAIL button in Leads, Contacts, Opportunities, Accounts and Cases. Clicking this SEND RMAIL button opens the RMail Send feature menu.
2. Main features are email encryption and sending Registered Email™ messages to track and prove delivery, content, and timestamp.



3. The RMail feature menu also includes options to send for recipient e-signature (**see also RSign for Salesforce.com app for additional e-signature functionality**) secure file sharing, recording recipient replies, and more.

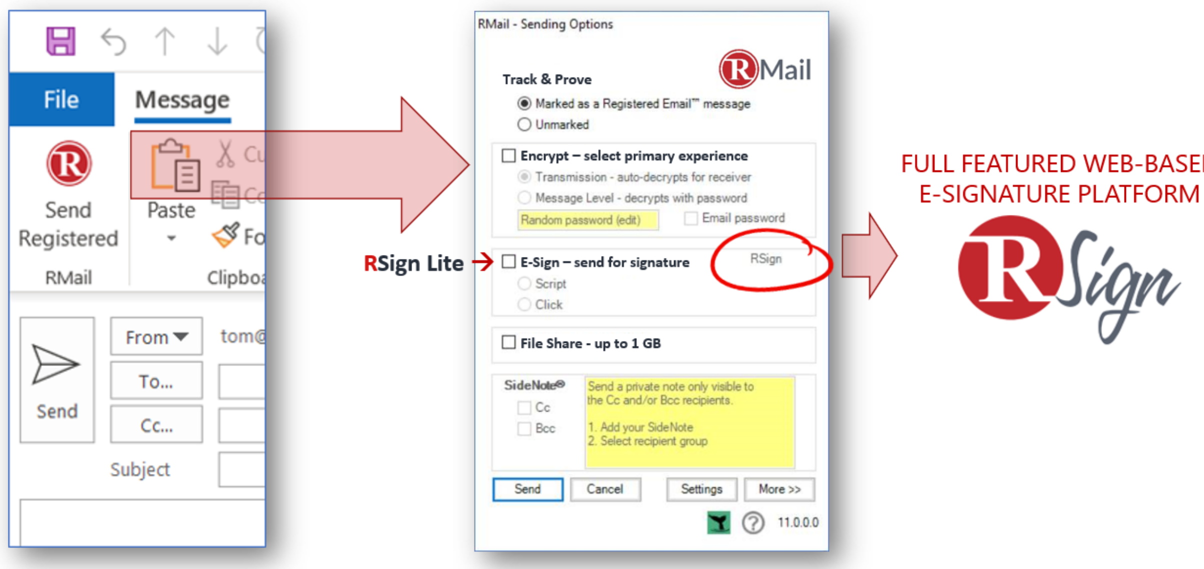


A Salesforce.com administrator can use the RMail Recommends™ functionality to create polices to recommend or require users to track, prove, encrypt, or e-sign based on Salesforce field values or templates.



Step 3. Advanced Settings.

1. The Salesforce administrator may access more settings in RPortal than available in the Salesforce app. Administrators should familiarize themselves with the RPortal admin panel. Ask your account manager for details.
2. The Salesforce administrator may also install RMail for Outlook for users to have parallel features available for email sent from Microsoft Outlook.



Step 4. RMail and RSign Service Plans.

1. **RMail:** Individual users can opt for different service plans, the most popular being RMail Standard, Business, and Enterprise plans. These and other plans provide a variety of low-use, low-cost options, power use options, volume options, and APIs and Salesforce app sending options. Remember:
   a. All users can use the service without any subscription or cost with an included services plan (up to 5 messages per user per month).
   b. A customer administrator can request access to higher volume plans, access to RPortal to manage users, service plan levels, and advanced settings, or manage some of these functions inside the RMail for Salesforce app.

2. **E-Signatures:** E-signature services (in RMail, called RSign Lite) are included in the RMail interface.

   a. **When to use RMail E-Sign (sending for recipient e-signatures from the RMail interface):** RMail E-Sign has three options from within the Salesforce interface It is the easiest e-signature service to use when you do not want to take the time to configure a document or agreement as a template for signoff. There is no set-up, drag-and-drop or other work. It is truly and attach-and-send-for-recipient-signoff process. There is nothing else as easy for the sender.
      i. E-Paper – permits recipient to free-form e-sign and type onto the document like pen on paper.

ii. **E-Sign Tags** – permits sender to add a tag to a document template (i.e. *<<Signature1>>* and this converts en-route to an e-signable fixed field at the recipient. This is enabled with a back-end setting in RPortal.

iii. **Email E-Sign (One-Click)** – permits sender to attach and send, and the recipient can click to confirm consent.

***TIP**: A sender can create some controlled signing fields if they learn about some of the advanced settings. From a recipient perspective, by default, they can simply put their mouse in their browser and write or type their signature on the signature line (and fill other fields). The user experience is not as controlled as with RSign advanced services, and the mobile experience is not as guided as with RSign advanced services.*

b. **When to use the RSign for Salesforce application for e-signatures:** RSign for Salesforce (or simply, RSign) is an enterprise-grade, full-featured e-signature service at an affordable cost. It includes every imaginable workflow setting. RSign is generally half the cost of other full-service providers. RSign includes highly configurable user interfaces, sharable templates, template rules and dependencies, sequential signing, custom workflows, real time reporting, advanced document configuration, advanced security and authentication, APIs, an elegant recipient signing interface, and much more. RSign also has an elegant recipient signing interface and provides all the functionality that you will need at a lower cost and with a friendlier service experience.

***TIP**: Higher volume business users of RSign for Salesforce require an additional -- and very affordable -- service plan for sharing volume of e-sign messages among a set of senders.*

c. RSign is committed to innovating for its customers evolving needs: There are only two enterprise-grade e-signature pure-play companies today; RSign and one other that is more expensive and more difficult to work with. These pure plays are driving product innovation. Other global e-sign vendors have been purchased by diversified companies and as typical, once part of a larger product portfolio, innovation slows. RSign is easy to work with, the most affordable, and a full-featured innovator.

WHAT ARE THE MAIN BENEFITS?

Assurance of privacy compliance with email encryption simple enough that people enjoy using it.

RMail® email encryption is so easy, especially for the recipient, that it encourages use and thereby reduces risk of data breaches or privacy enforcement actions. Not all encryption services are the same; others are too burdensome and, as a result, are little used and therefore increase risk (from non-use or circumvention of use). With today's more sophisticated privacy regulations (e.g. HIPAA, GDPR) and hacker tactics, encryption is essential. RMail makes it easy, enjoyable, automated.

Peace of mind, end-user visibility of successful delivery for important messages, with proof.

RMail® Registered Email™ services makes delivery and open tracking visible to the sender, providing assurance and peace of mind that important email was successfully delivered. This is returned in the self-authenticating Registered Receipt™ e-record, making it easy to resolve disputes – as easy as forwarding this receipt to any questioning party. The receipt is a self-contained forensic record, eliminating the need to scour server logs to try to investigate and present delivery evidence.

Cost savings with less paper, mail, postage, and administrative time.

RMail® Registered Email™ and RSign® e-signature services replace printing, postage (first class, receipt, and certified mail), scanning, faxing, administrative work and other hard costs. Businesses can send required notices with proof of content delivered and timestamped. Users can easily send agreements for recipient electronic signoff or easily e-sign documents that they receive, thus saving wasted time, cost, and other drains on your business.

Software service cost savings, reducing need for other business applications.

RMail is all-in-one. Each feature is top rated or award winning. Rather than purchase separate services for email encryption, email tracking, e-signatures, file sharing, and DLP/malware protection, with RMail, businesses can add all of these to existing email systems, at an affordable price. All RMail services combined generally cost less than purchasing just one of them from another provider; and the RMail user experience is better; elegantly integrated into Office 365 and other programs.

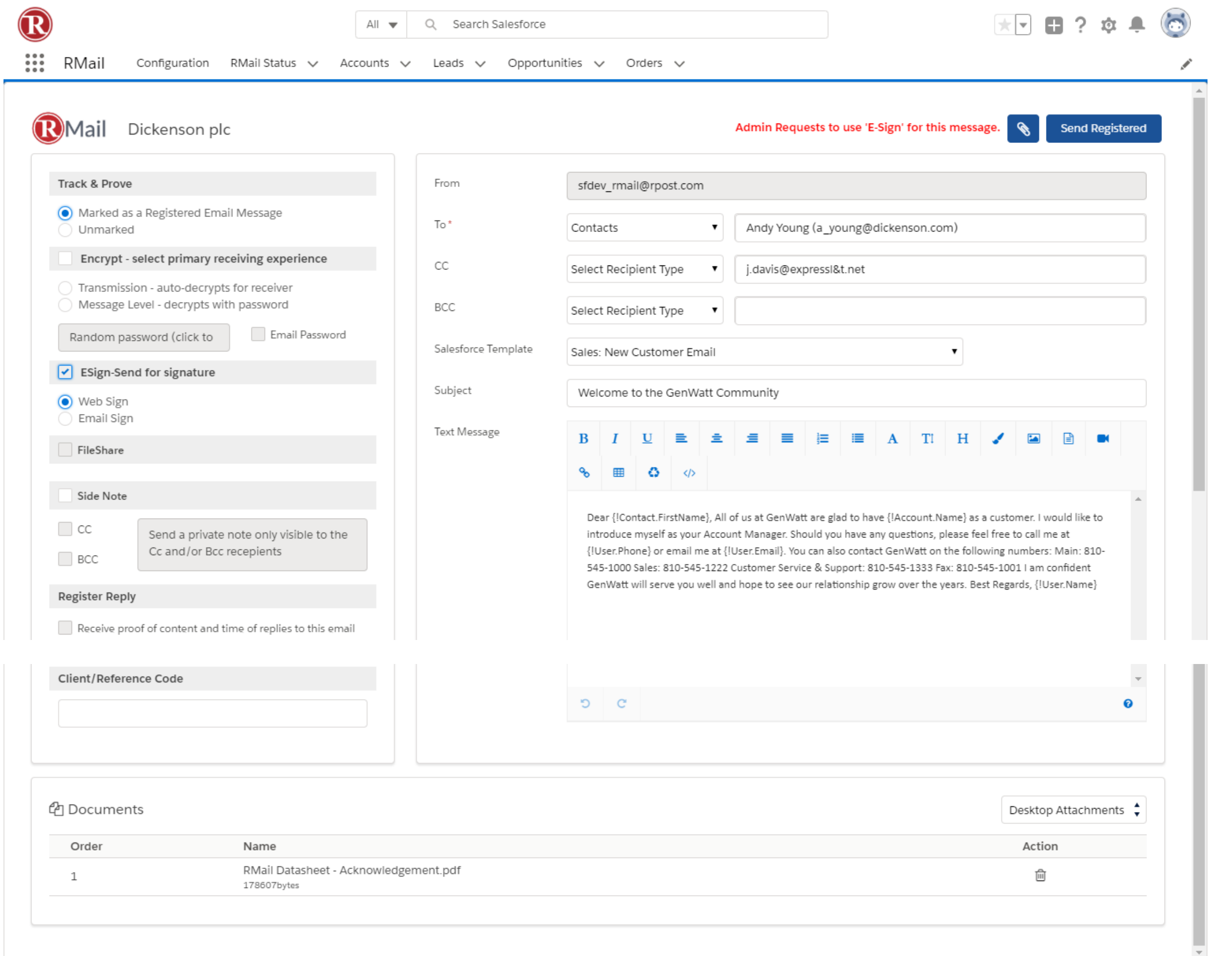
More security reduces risks. More security automation simplifies life for IT staff.

RMail makes security automation services easy and automated, reducing risk. RMail Recommends™ can automate encryption based on message template or Salesforce field values. **RMail encryption** automatically detects the simplest, most secure method of transmission, and dynamically adjusts for the best recipient experience.

ADMINISTRATOR GUIDE

1. Interface After Installation

End users will have options as depicted on the left. Details of some of the unique functions specific to RMail operating in Salesforce are in this guide. To learn more about the functionality of each standard RMail feature or service, visit the RMail support center at https://support.rpost.com. Explaining the function of each RMail feature is outside the scope of this Guide.



RMail main functions:

- **Track & Prove**: Track, prove and certify your important emails by sending them as **Registered Email**™ messages. RMail includes timestamped proof of delivery with proof of message body and attachment content so you can know precisely when your email has been delivered with open tracking and a forensic audit trail on a message-by-message basis. Plus, it's easy for senders to self-determine message status without having to contact IT staff. The **Registered Email™** service provides:
  - ***Timestamped Delivery and Open Tracking Record.*** *The Registered Receipt e-mail provides timestamped message status to prove content delivered, opened, failed.*
  - ***Self-Authenticating Receipt.*** *The Registered Receipt e-mail authenticates and accurately reproduces the original e-mail and attachments, including any attached disclosures, which satisfies the E-Sign Act's retention and accurate reproduction requirements, EIDAS*

requirements, and other country and regulatory proof of delivery and proof of receipt requirements.

  - ***Encrypted Registered Email™ Message:*** *A Registered Email message may be sent encrypted or configured to record a recipient reply, encrypted reply, e-signoff, or click-consent.*
  - ***Unique Transaction Record.*** *The returned Registered Receipt™ is a durable, verifiable, and self-contained record of each email transmission. A sender views this receipt in their email program. This receipt includes an XML file, and the service includes a variety of reports, each with transmission data that may be extracted and imported into the sender's systems. This receipt's HTML file may be used by any party to authenticate the transmission data and reconstruct the original email content – without the Registered Email system storing a copy of the message or transmission data. Message status data and the Registered Receipt transaction proof records may be retrieved, all automated.*
  - ***Registered Receipt™ ZIP FILE*** *This file is returned into the Salesforce account record and contains all the authentication information associated with all recipients of each sent message.*

- **Encrypt:** Easily encrypt sensitive emails and attachments for security or regulatory compliance. Includes a one-click, bi-directional encrypted reply option for recipients. RMail automatically detects and delivers with the simplest user experience for each recipient (**Transmission Encryption**) and provides a toggle option to maintain encryption inside each recipient's inbox **(Message-Level Encryption)**. It also provides auditable proof of data privacy compliance on a message-by-message basis.
- **E-Sign:** Accelerate legally-binding signoff on documents and agreements with a simple-to-use electronic signature service. You can attach any document and send for recipient e-signoff, with no need to set up or configure the document beforehand or online. With one-click users can access the full version of RSign for access to advanced e-signature features including templates, rules, dependencies, formulas, reminders, management tabs, advanced e-sign security, and much more.
- **Secure File Transfers:** To send an attachment as a link or secure link the has an auto-expiration (default 7 days, configurable by the administrator in RPortal), simply attach or drag and drop files up to 1.4 MB in cumulative size and send. For transfers up to 1 GB per send, users may log into the RMail web app directly (app.rmail.com) and user their current RMail username and password, or us the RMail for Outlook add-in. There is no need to visit online portals to create, share, and manage folders. There is also no need to invite others to have access to your main file repositories. RMail automatically creates a one-time online folder, per send, for each recipient to retrieve files, and it auto-purges the data after a configurable time period to optimize security and compliance.
- **Send Contextual SideNote® Message:** Insert private notes into an email visible only to the Cc and/or Bcc recipients to provide private context as to why they have been copied on the original message.
- **Message Status to Retain Auditable Tracking and Verifiable Proof:** A Registered Receipt™ email record is automatically generated and returned to the sender with every single RMail message sent. This receipt provides the sender visible, verifiable and auditable proof of who said what when, who agreed to what when, or fact-of-data privacy compliance.

- **Automate Security by Content Policy:** RMail Recommends™ is a full featured security automation service.

Some of unique functions above include:

- **RMail Recommends™:** policies are noted in red next to the Send Registered button.
- **File Share**: provides the user an ability to send and share files up to 1.4 MB from within Salesforce.com and up to 1 GB from within the RMail web app. These files can be uploaded from a desktop or some shared online drives.
- **Attachments**: One can also upload documents to send as normal attachments.
- **From Field:** The RMail logged-in user will be auto populated in From field.
- **To Field:** A User can select recipients from Contacts, Leads, or add new Recipients.
- **Templates:** A User can select salesforce templates from dropdown of Salesforce Templates. By selecting template subject and the template text message will populate.
- **Receipt and Status After Sending**: On click of the Send Registered button, the email is sent to all recipients. The RMail Status record will generate status information as a child record for each recipient record in Salesforce.

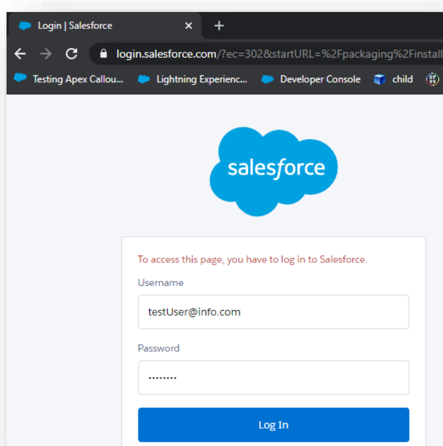
2. Installing Details

2.1. Installing RMail for Salesforce into Salesforce.com

RMail for Salesforce

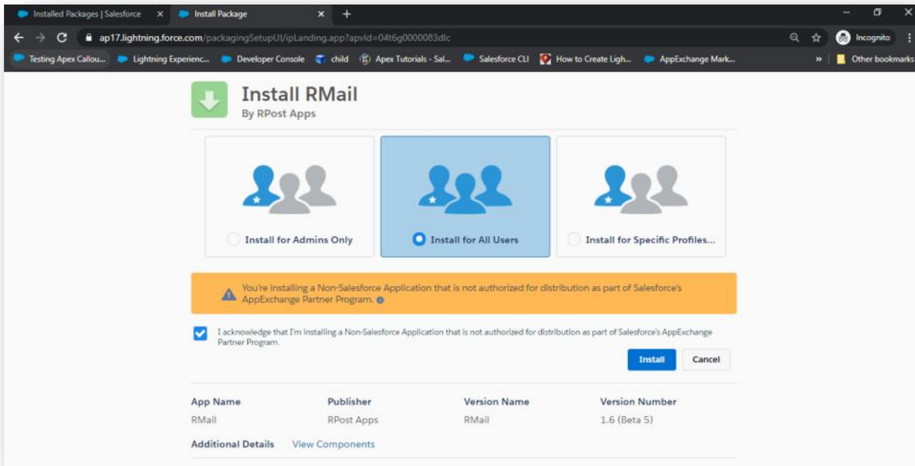
(This replaces RPost for Salesforce in the apps marketplace. Access RMail for Salesforce with the following installation URL below).

Step 1: To install application in Developer, Sandbox or Production Salesforce org, a user with administrative rights logs into Salesforce.com and access our [AppExchange listing].



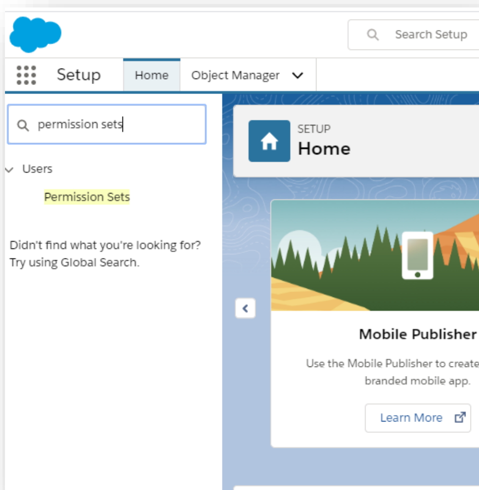
Step 2: After login, the Salesforce Admin ("Admin") will see the installation screen shown below. Based on requirements, the Admin can assign RMail app visibility to Admin, All Users, or Specific Profiles. After selecting, you will click the Install button.

(Note, RPost is migrating users from its older app and providing this RMail app using a manual link install process until this app is directly linked to the RPost Salesforce.com profile. Ignore the yellow notification.)

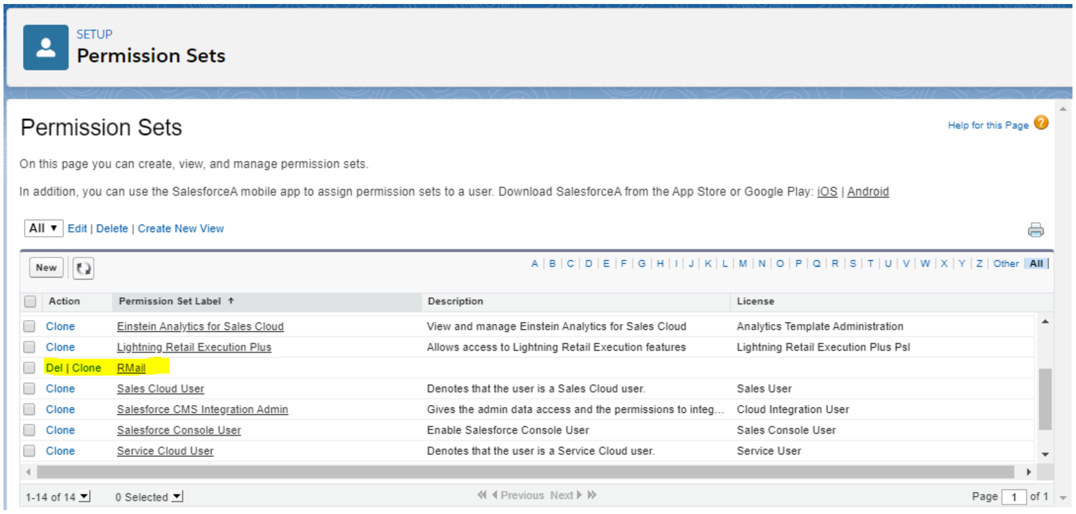


Step 3: Once the application has been installed, you need to assign **Permission Sets to Users**. Following are steps to assign Permission Sets:

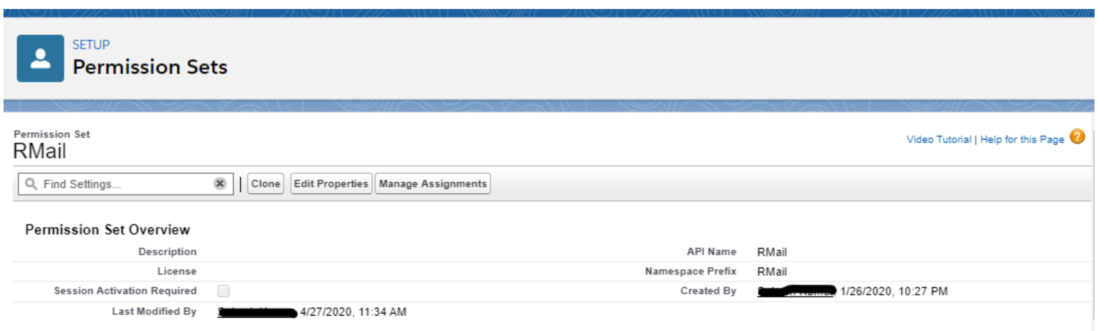
a. Go to Setup and search for "Permission Set" in quick find.

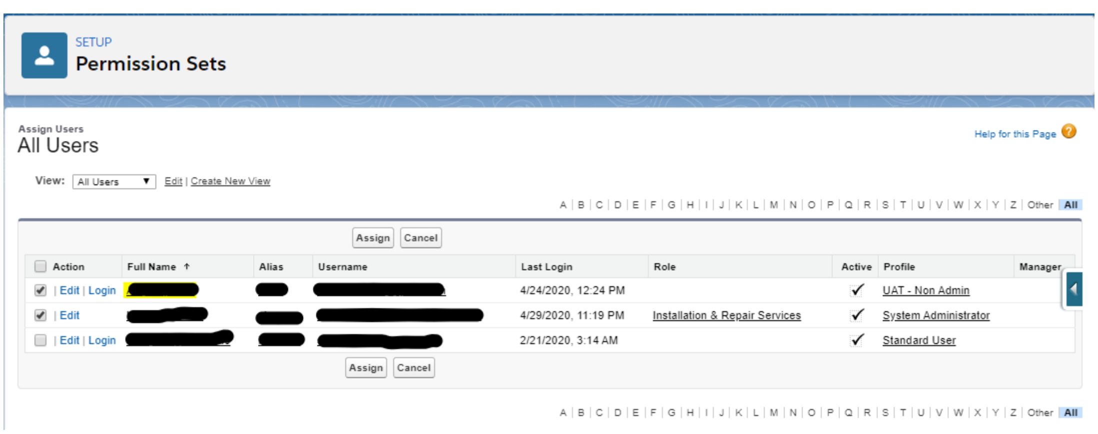


b. Check for Permission Set Label with name “RMail” and click on it.



c. At the top of the Permission Set screen you will see the “Manage Assignment” button, click on that and on next screen you will see “Add Assignment“ button, click on that button and select the Salesforce users to whom you want to assign RMail to.





2.2. Configuring Company and User Settings in RPortal (RMail Admin Portal)

There are four important settings to consider in RPortal:

1. **Company Local Time Zone:** This is important to configure so that the Registered Receipt and message status local time information is properly captured and distinguished from the UTC timestamps.
2. **E-Sign:** E-Sign: If you are using RForms, RMail E-Sign Tags, or have certain e-sign requirements, these can be adjusted inside RPortal for the company.
3. **E-Security**: If you prefer certain email encryption behavior that is not available inside the RMail for Salesforce.com interface, visit RPortal to make these adjustments.
4. **Service Language:** If you prefer the emails sent out to recipients and the Registered Receipt emails to be returned in a language other than English, this may be configured inside

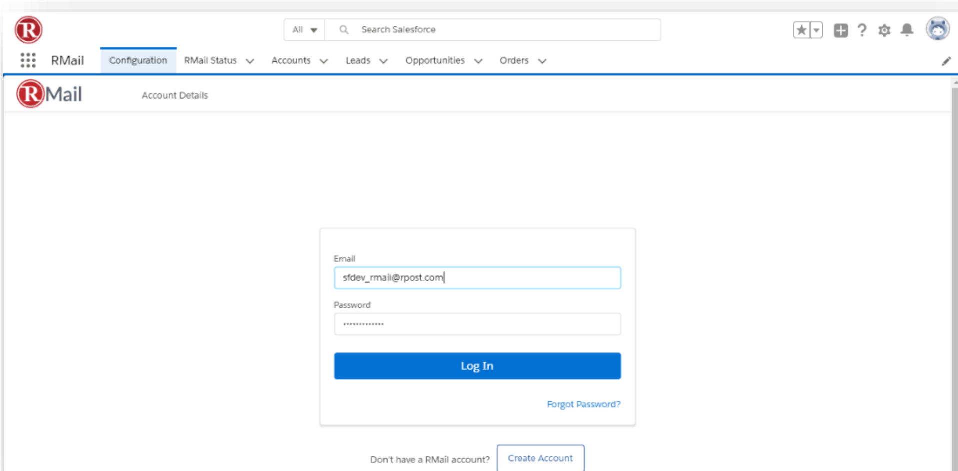
2.3. Installing Advanced E-Signature Functionality for Salesforce

In addition to RMail for Salesforce (which includes e-signatures) there is an advanced e-signature app called **RSign**. For more information on RSign, contact your account manager. To explore the RSign for Salesforce app, you may use the instructions provided by the RSign team.

3. Configuration: Accounts, Users, Layouts, Objects

3.1. Login Page

RMail for Salesforce adds an RMail view, and also an RMail Configuration and RMail Status tab that may be added to other views. RMail recommends adding the RMail Status tab to main sales or business views. The RMail Configuration tab is for end-user log-in to RMail to connect their user account prior to first use.

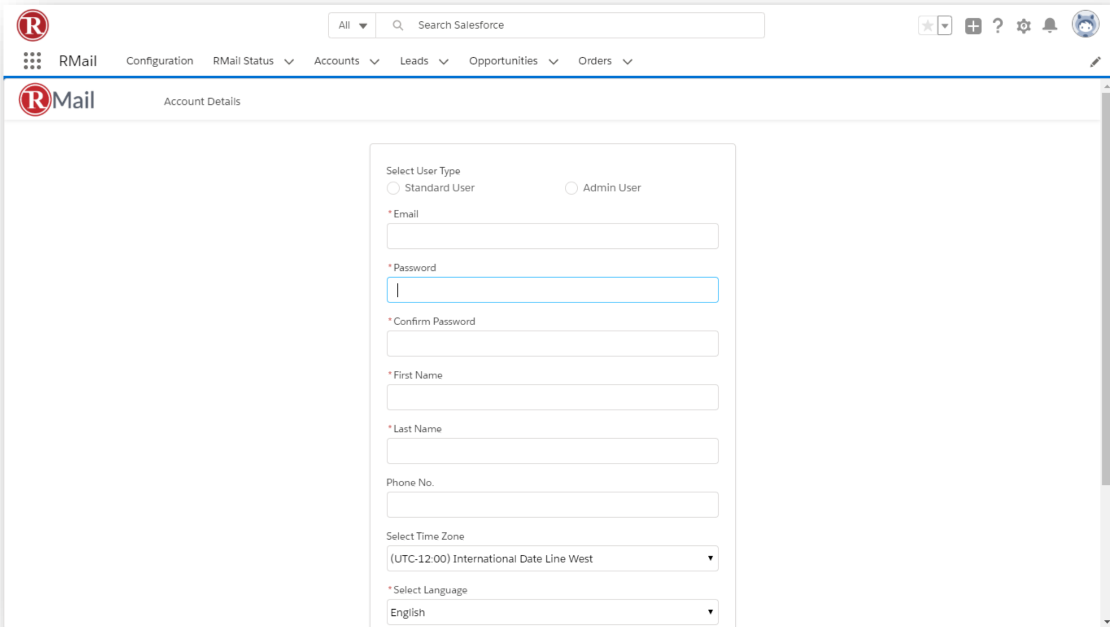


The User/Admin can login to RMail by using login screen with RMail credentials.

1. User/Admin can login to RMail by using login screen with RMail credentials.

2. Once the user logs-in, the user will be redirected towards an account details screen. **All RMail settings tabs will be visible to only the Salesforce user whose profile is system administrator.** For non-admin users all tabs will be invisible except the user administration settings and user configuration (log-in) tabs.

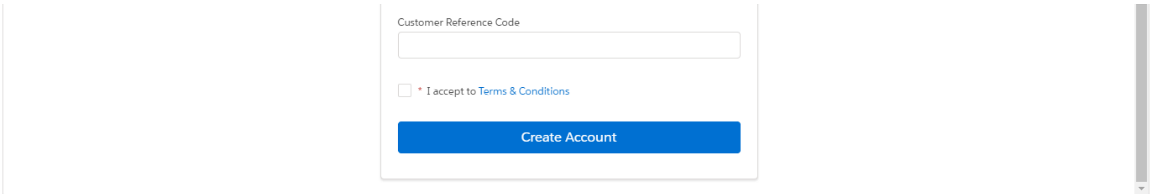
3.2. Admin Create Account Page



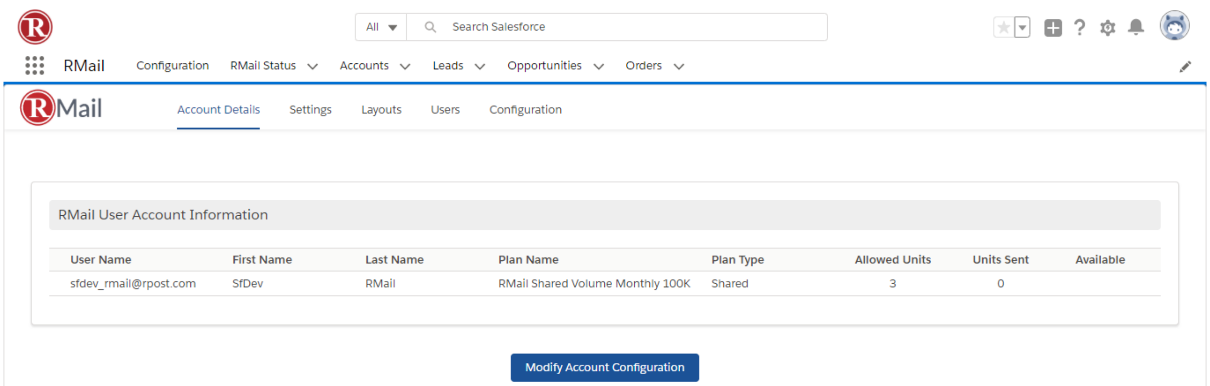
The User or Admin can create new RMail account using the Create Account button on the login page.

1. When registering a new user, it is imperative the right user role is selected (standard user vs. administrator).
2. If the Admin or User does not have RMail account, then User can register an RMail customer account using the Create Account button present on the login page.
   - **a.** The User (customer admin) needs to fill all the required information to create account, and accept the Terms & Conditions. After this, a new account is created for User (customer admin). Once the account is created for User, the User will be redirected to a login page. In the user already exists, the User will get a message indicating such.
   - **b.** After submission of all details, the user will get email containing an activation link. On click of the activation link and completing the process, the user can login successfully. If the activation process is not complete, on login, the User will get error message indicating activation needs to be completed.

3. If the customer admin is already an RMail or RSign customer (in RPortal), the customer administrator must request from their account manager their customer reference code – entering this code will connect the Salesforce application to their exising RMail or RSign customer account.



3.3.Account Details Page



Detailed information of a logged-in RMail User/Admin will be displayed in Account Details.

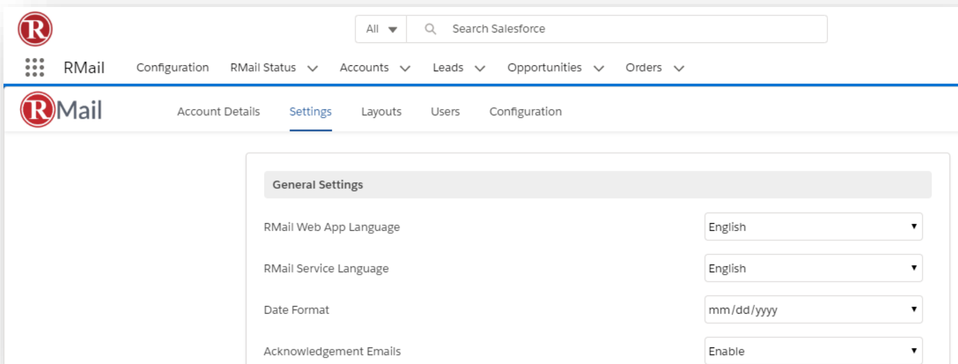
1. Account Details page contains all the information of a logged-in RMail User/Admin such as their Username, First name, Last name, which type of plan name, plan type (individual plan or shared volume plan), unit max per plan period (per month or per year depending on whether a monthly or annual unit plan), units sent per plan period, and remaining available units per plan period.

2. Modify Account Configuration <u>only</u> provides the User options to modify their password.

3.4.Settings Page

There are three settings groups available within the Salesforce app. **There is a fourth area** where an admin may adjust many more settings -- in the RPortal administrative console. Administrators should contact their account manager for access to RPortal.

General Settings



RMail Web App language will change the language in the web user interface. Customers that need languages in the Salesforce.com user interface other than English, should request such from their account manager.

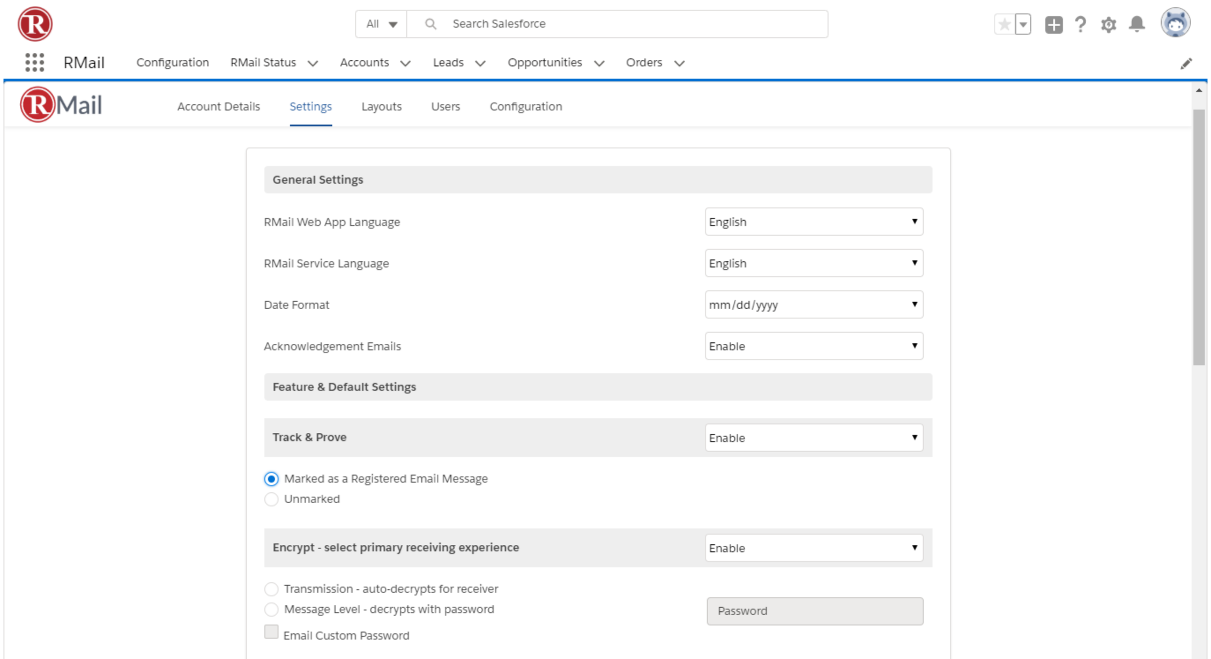
RMail Service Language will change the language in the emails that are sent to recipients and receipts returned to users.

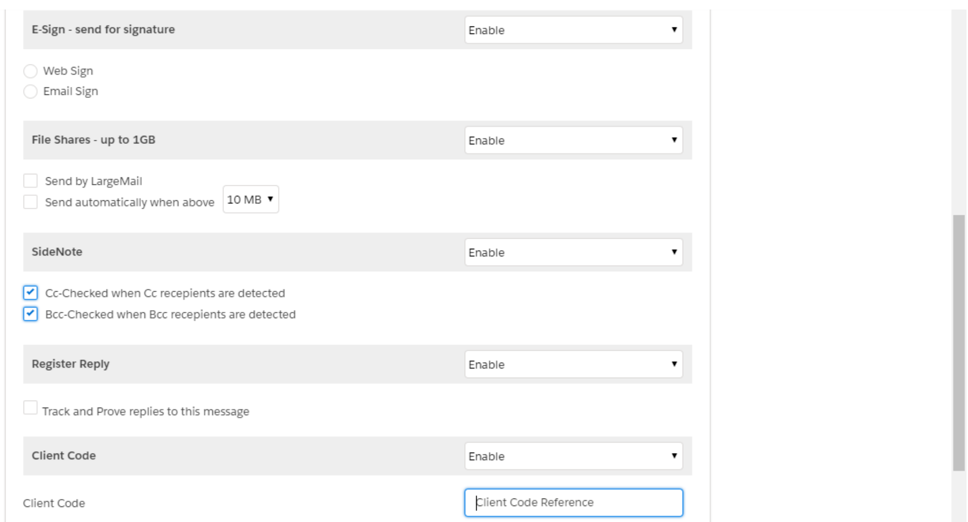
Date Format: changes the format rom US vs. European/International formats in the RMail service receipts.

Acknowledgement Emails: these provide sender a record that the email has been sent to the recipient (not successfully delivered – the Registered Receipt™ email provides proof of delivery) and may be enabled or disabled.

Feature Default Settings

These settings enable or disable defaults for service features in the sender user interface.





RMail Receipt Retreival Settings

The administrator can set the intervals for how often RMail Registered Receipt™ emails and message status data are automatically retrieved from the RMail system. Receipts are “retrieved” every 6 hours (default) with additional checks from 1 to 7 times at the same time interval; and with options to refresh (retrieve) data on demand with a click for up to 30 days from each send.

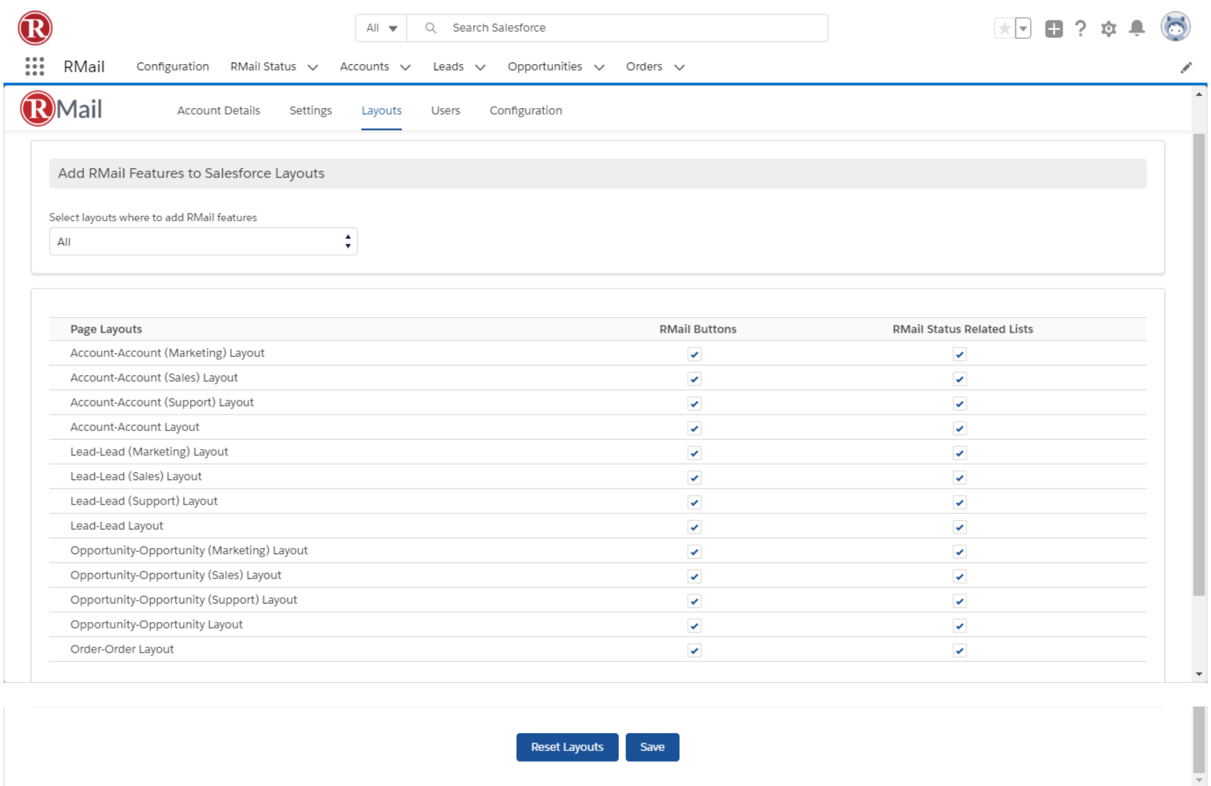
For example, if the setting is saved as **Every 4** hours **for 6 intervals**, then salesforce will try to retrieve the Registered Receipt™ email for every 4 hours, 6 times. It will not call the API automatically after the 6th try, but a user can Refresh Receipt to attempt to receive additional open/other status anytime.

Note: A Registered Receipt™ email is always generated within 2.5 hours of sending, so within the first interval, the Registered Receipt email will be retrieved with all delivery information. Additional open-detection or signing status information may be updated in follow-on automated retrieval or manual refresh receipt actions. Dropdown has Hours Option as 4 and 6, and Interval options from 1 to 7

3.5. Layouts

The Admin can add RMail features to different Salesforce layouts and objects. By default, RMail is added to Leads, Contacts, Opportunities, Accounts, and Cases.

RMail Buttons below means the send options, and RMail Status means the retrieval of message delivery status data and receipt emails.



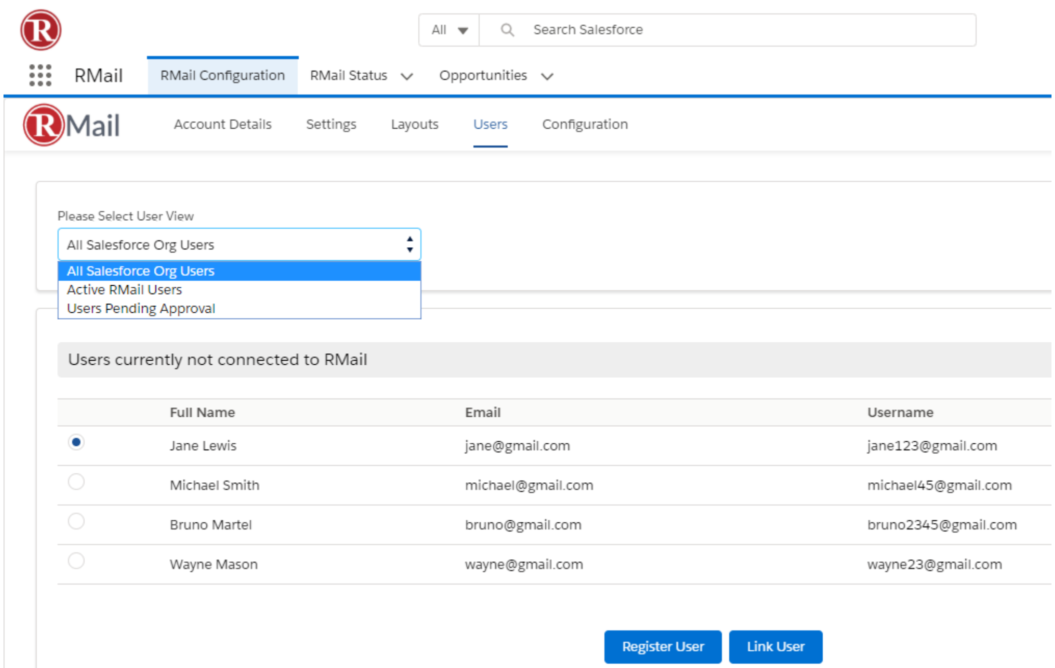
3.6. Users

All the company's Salesforce Org users, active RMail users, and users pending RMail approval will be displayed on Users tab. All Salesforce Org Users are users who do not have any RMail Account or who have an RMail account but are not yet associated in with their Salesforce user.

For users not yet registered in RMail with a service plan can register here for the default service plan and then contact their account manager to change plans, or the administrator can request plan changes to the appropriate available plan. Users that are registered with an RMail plan can associate their plan to their Salesforce user.

Active RMail User: User who has an RMail account that is linked to their Salesforce user. The admin can de-active the active RMail user by using Deactivate User button.

User Pending Approval: Users will be displayed here if their Salesforce account is not yet linked to their RMail account.

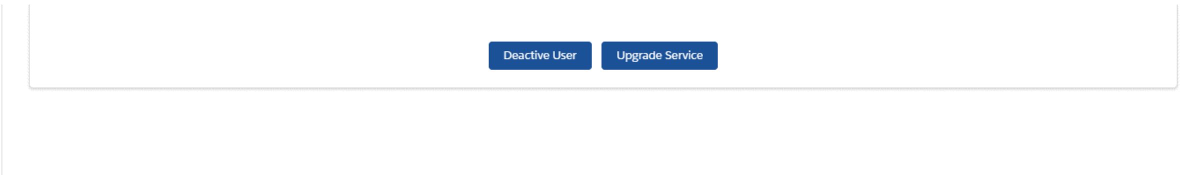


Remind User: sends email to respective user that their approval status is pending (and reminds the user that they need to log-in to their RMail account within Salesforce.com to link their Salesforce.com user ID).

Register User: User can register for an RMail account if the user does not already have an RMail account. The User will be redirected to Create Account page with pre-populated details values.

Link User: If the user has an RMail account that is not linked to their Salesforce org account, then by clicking on Link User, the user will be redirected to Link User page where User's username will be prepopulated and on-click of Link User button, their RMail account will be linked to their Salesforce Account.

Upgrade Service: This sends an email to begin a process to change a user's RMail service plan.



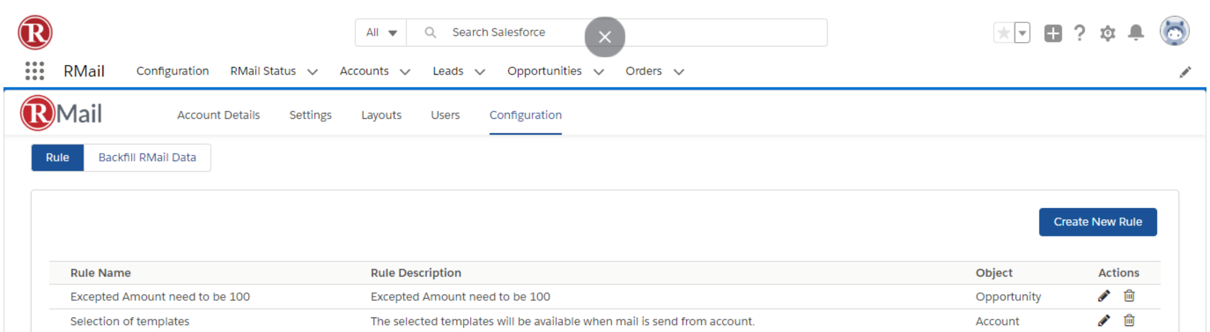
4. Configuration: Rule for Policy-Based Sending

RMail Recommends™ is a unique feature that lets an administrator configure **Rules** that create at **Trigger** that apply a **Policy** that causes an **Action**.

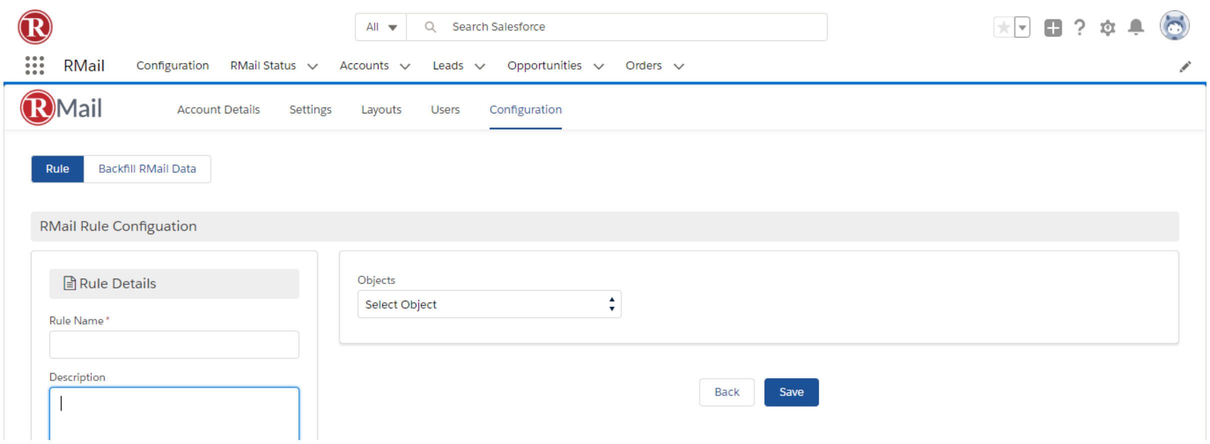
a. The **Trigger** of the policy and action can be based what is in an Object:
    ~~i.~~ **Field values** ~~or~~
    ii. **Message template** name.
b. The **Policy** is to indicate that the administrator:
    i. **Recommends** the user send with a specific feature with a recommendation message,
    ii. **Requests** the user send with a specific feature, with the feature pre-enabled, or
    iii. **Requires** the user send with a specific feature, with the feature locked on.
c. The **Action** is to send:
    i. **Encrypted** email,
    ii. **Registered** Email with e-delivery proof, or
    iii. **E-sign**, for recipient e-signature.

4.1. Rule for Policy-Based Sending

In the Configuration tab, select the Rule option.



In the Rule area, select the Create New Rule button.

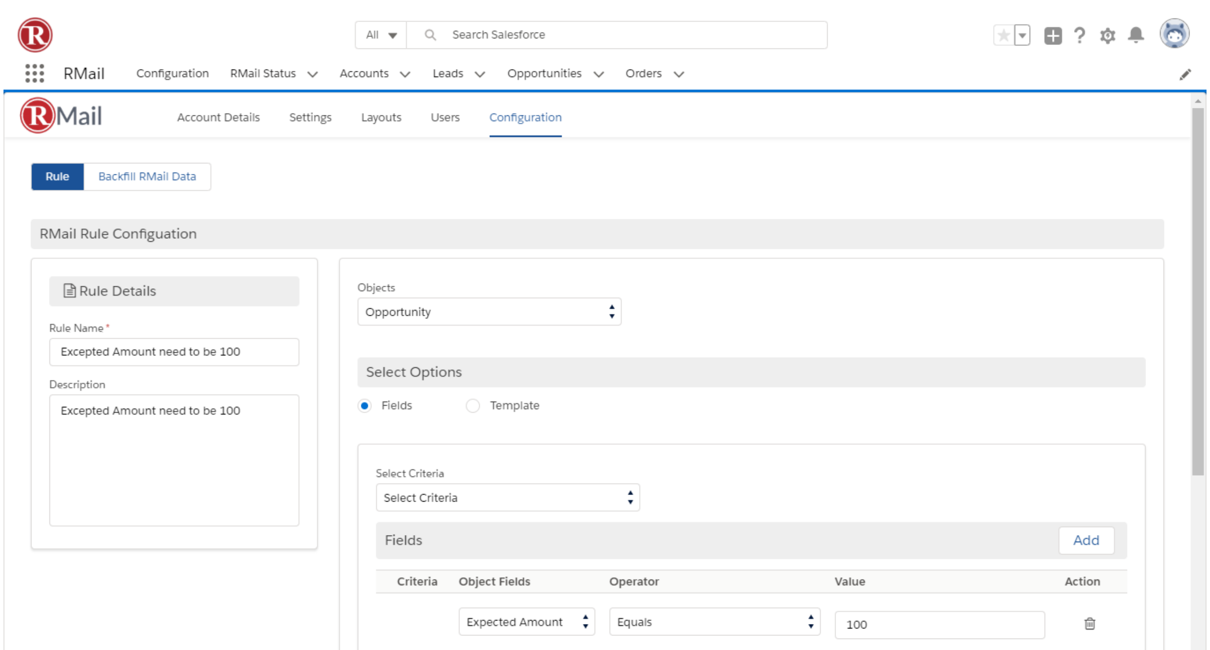


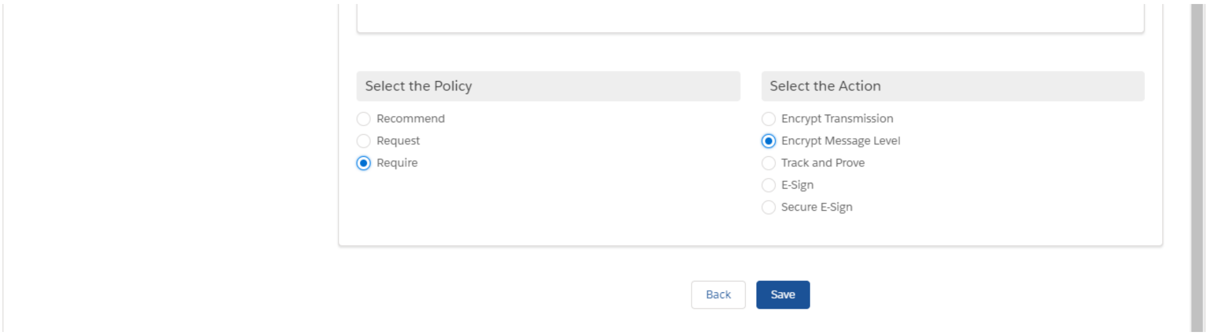
Add the Rule Name, Rule Description, and select the **Object** that will check for the Rule.

Note, a User can create only one rule for one object. Once the rule is created for one object, then next time when user creates the rule, that object will not be visible in drop-down list of selectable objects.

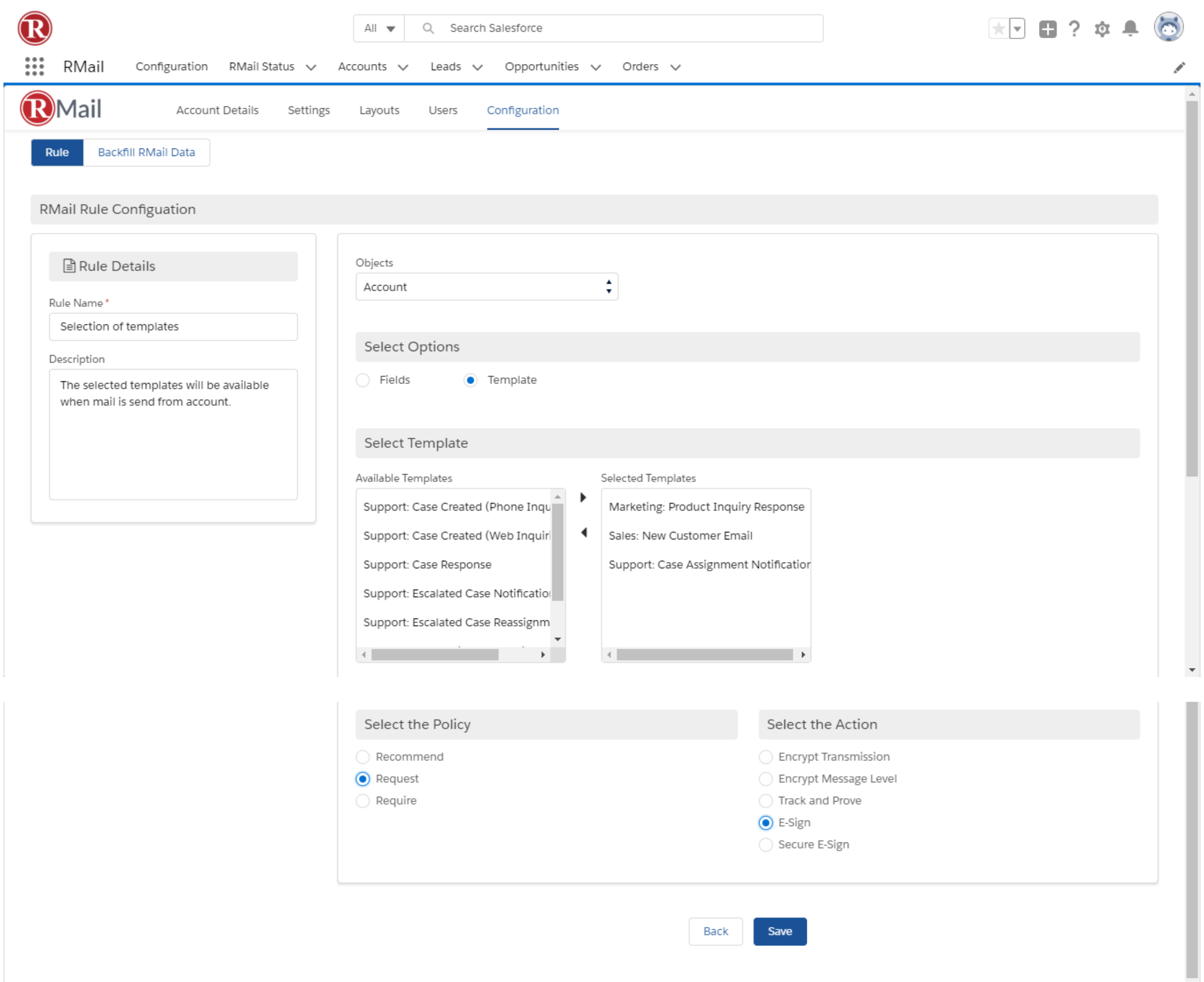
d. Choose to **Trigger** the rule based on **field** values or a **template** name.
e. Select the **Policy** (Recommend, Request, or Require).
f. Select the **Action** (Encrypt Transmission, Encrypt Message Level, Track and Prove (Send Registered Email service), Send for E-sign, Send for Encrypted E-sign).
    i. *For more detail on what these actions do, visit the RMail support center at https://support.rpost.com .*

Trigger based on an Object's <u>Field Values</u>

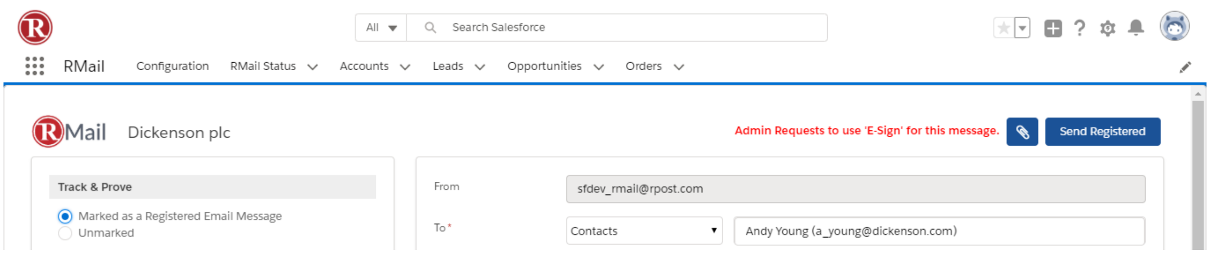




Trigger based on an Object's <u>Template Names</u>



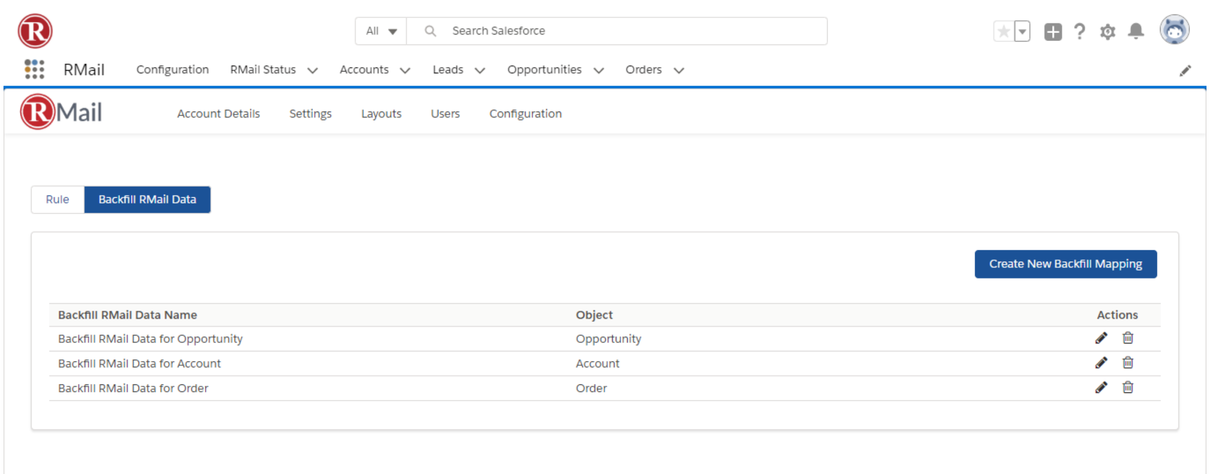
RMail Recommends policy displays in red next to the Send Registered button, alerts user before sending.



5. Configuration: Backfill RMail Data into Salesforce Object

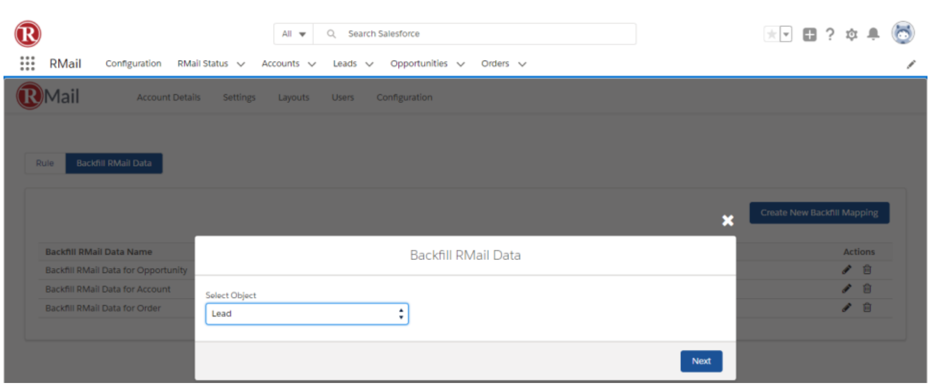
A central part of this RMail for Salesforce app is backfilling message status information and Registered Receipt proof records into a Salesforce Object and mapped fields, so that the Salesforce administrator can trigger follow on workflows based on certain values being populated into mapped Salesforce object fields.

To start Backfill RMail Data mapping, in the Configuration tab, select **Backfill RMail Data.**

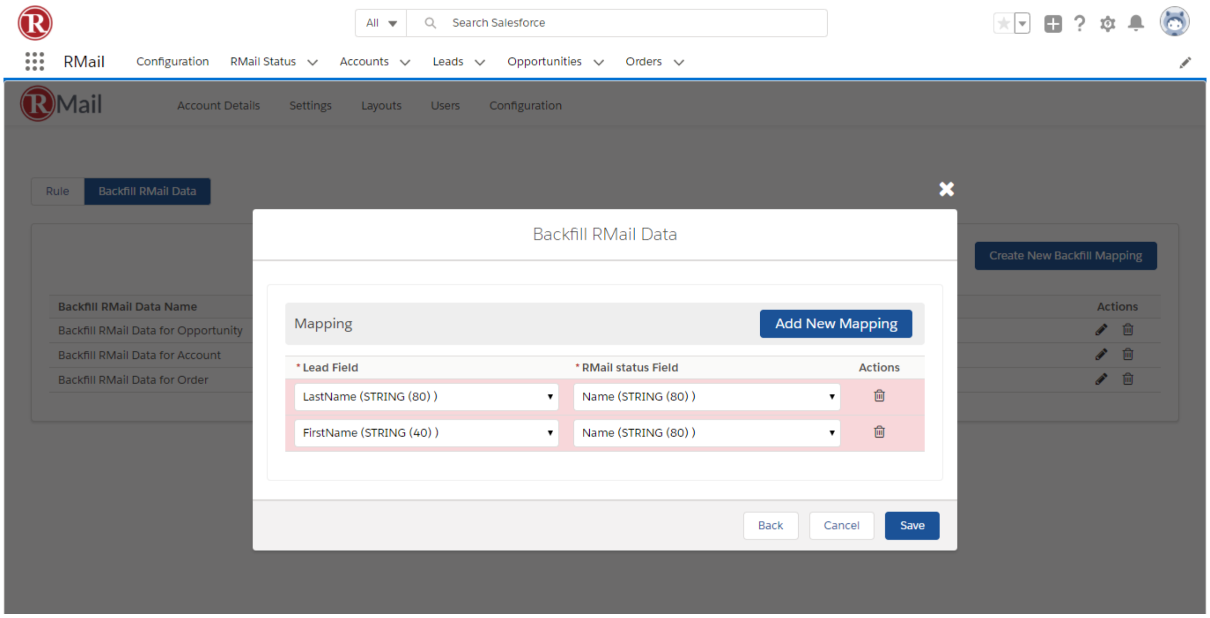


Then select "Create New Backfill Mapping" and select the Object that will contain the fields to map the RMail data to. A User can create multiple mappings but only one field mapping per Salesforce Object.

Backfill action is manual so as not to automatically overwrite data without a user action.

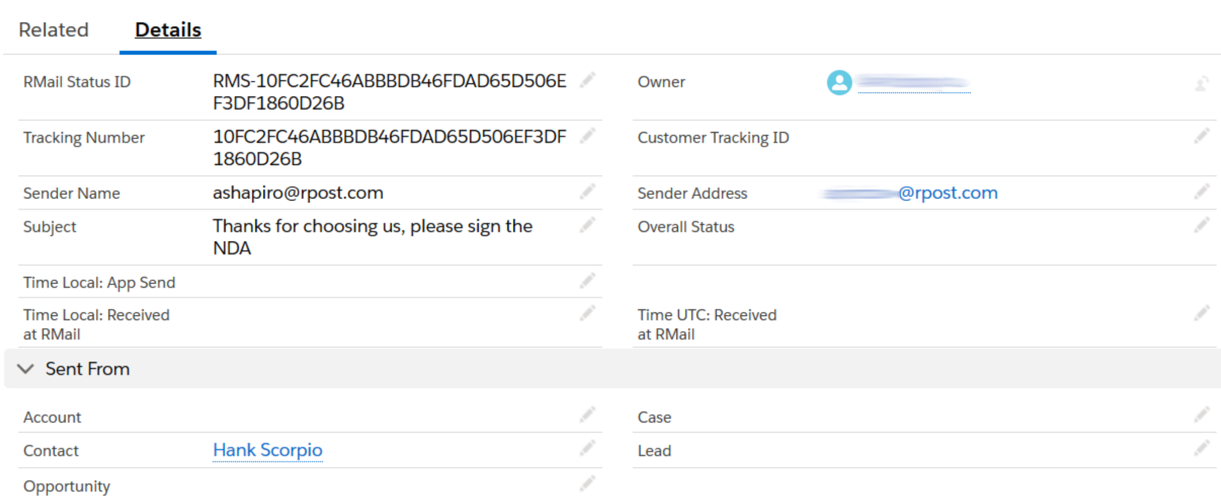


Create the mapping use the pull-down arrows to find the Salesforce Object “field” and the RMail status “Field”. The RMail status field data will map in the direction to populate the mapped Salesforce Object “field”.

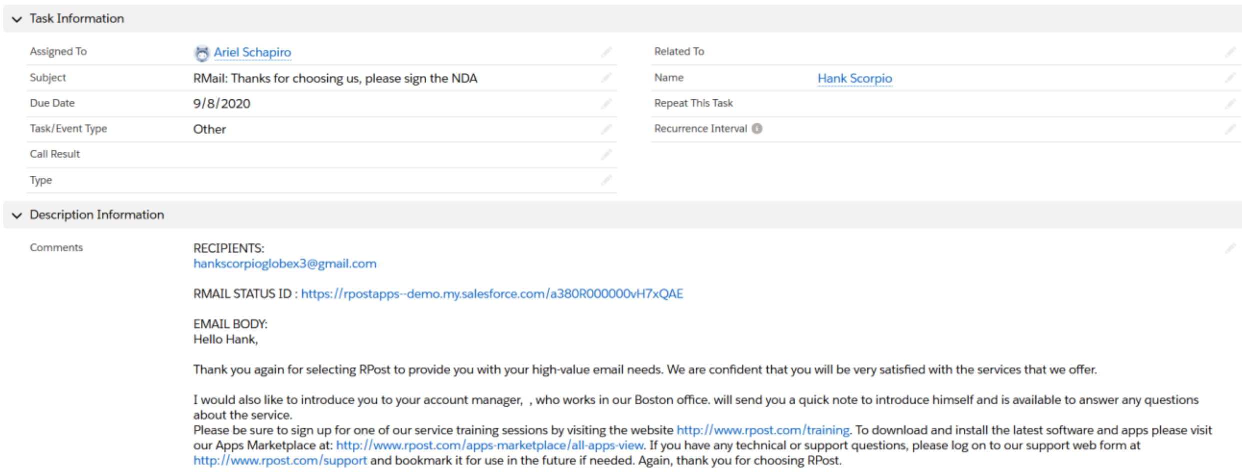


6. RMail Status and Activity History

After sending an email communication through the RMail for Salesforce application, an RMail Status record will be created. This record contains all the tracking information related to the RMail message that was sent, like sent, delivered and opened times, recipients and the Salesforce record from which the message was sent.

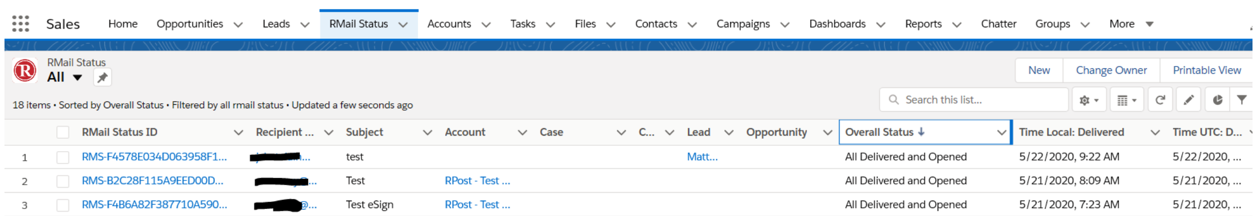


An Activity History record will also be created related to the recipients and the object the message was sent from. It will include the message subject, content and recipients.



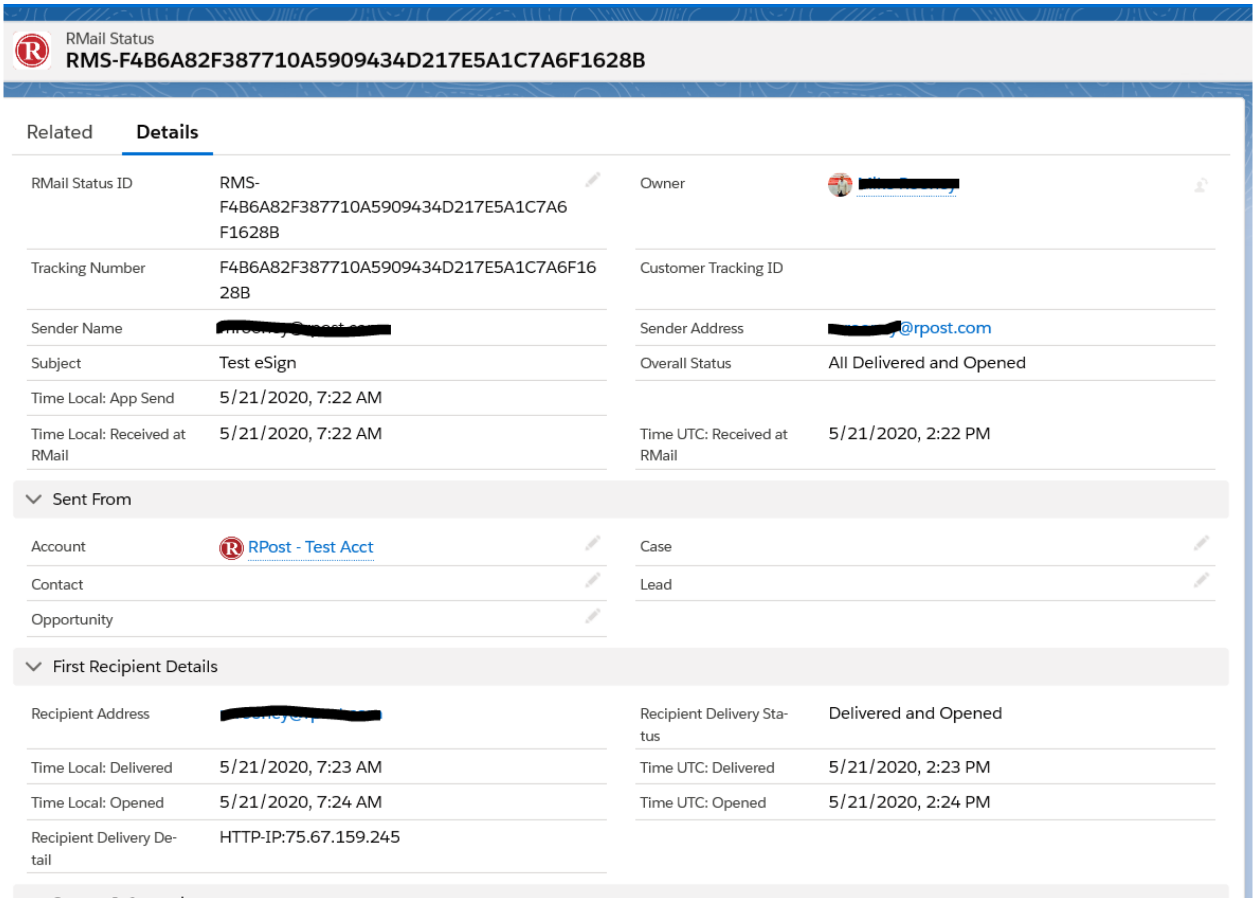
7. RMail Status Tab for Users

The RMail Status tab has columns that may be configured by the Salesforce administrator and created as views, in the normal way, to prioritize the information that is important to the user in their view. This below is an example default pre-configured view before any user customization.



Note, the RMail Status tab includes access to all send information, message status, and Registered Receipt proof records for objects (leads, opportunities, accounts, contacts, cases) that the Salesforce user has access to, whether or not that user sent the message.

A user may click on any of the record hyperlinks to display a more detailed view of the record.



Notes:

"**Overall Status**": RMail Message Status provides a summary status to make it easy to trigger follow-on activities based on this field if so desired. **It is a summary based on an analysis of ALL recipients for a particular send.**

- **All Delivered** means all recipients have been successfully delivered to with a Registered Receipt evidence record recording the forensics for such, and the Salesforce application will continue to work to retrieve additional information automatically until the last scheduled interval completes, and at any time, manually.

- **All Delivered and Opened** means all recipients have been successfully delivered with open records, to with a Registered Receipt evidence record recording the forensics for such, and the Salesforce application will no longer continue to work to retrieve additional information

- **Delivered (Contains Failure)** means all recipients have been successfully delivered to, other than at least one delivery failure among recipients, with a Registered Receipt evidence record recording the forensics for such, and the Salesforce application will continue to work to retrieve additional information automatically until the last scheduled interval completes, and at any time, manually.

- **Completed (Contains Failure)** means all recipients have been successfully delivered and/or opened, other than at least one delivery failure among recipients, with a Registered Receipt evidence record recording the forensics for such, and the Salesforce application will no longer continue to work to retrieve additional information automatically; at any time, manually, a user may additionally refresh to get any updates.

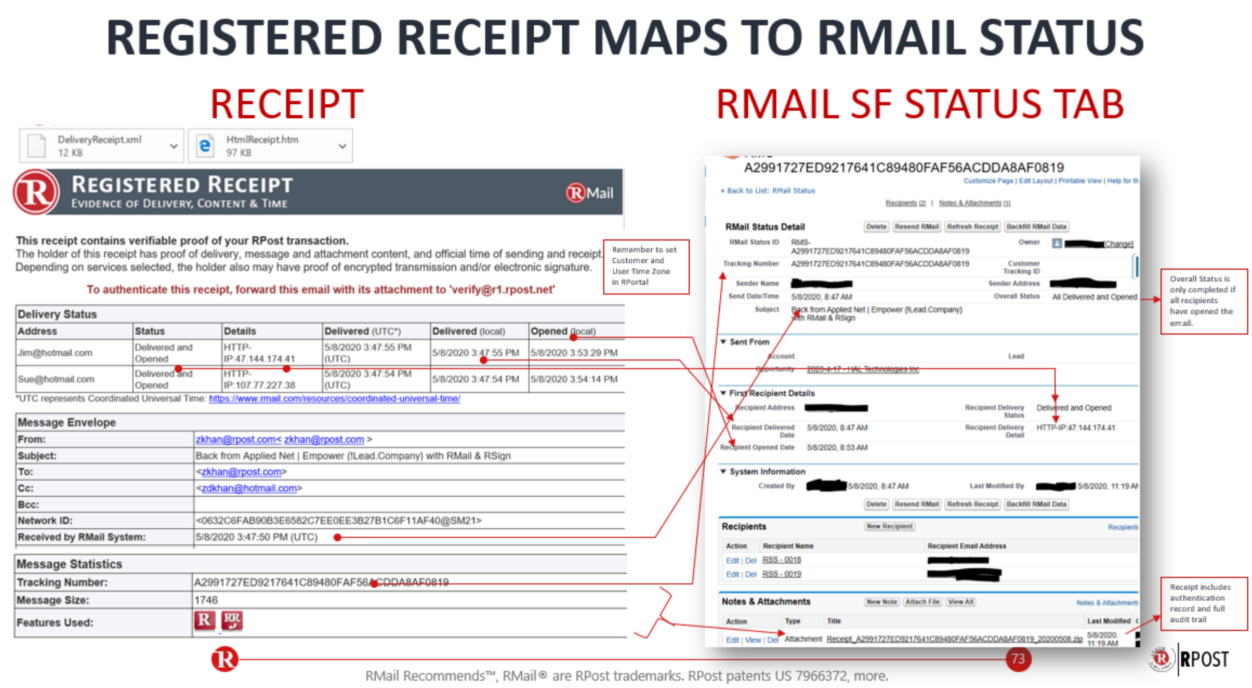
"Time" Status: There are various time stamps that correspond to times in the Registered Receipt™ email record. Note, RMail recommends users update their Company Local Time setting in RPortal. **This is based on the status of the FIRST RECIPIENT in the address field of the send event.**

- Time Local: App Send – this is the local sender time of the send event in Salesforce.
- Time Local: Received at RMail – this is the time the message with all recipients was received at RMail for processing in local sender time.
- Time UTC: Receive at RMail – this is the time the message with all recipients was received at RMail for processing in UTC time.

First Recipient Details (Note Additional Recipient Details are in Related Tab in RMail Status)

- Recipient Delivery Status – status for the First Recipient.
- Recipient Delivery Detail – status details for the First Recipient.
- Delivered (UTC): Time UTC Delivered for the First Recipient.
- Delivered (Local): Time Local Delivered for the First Recipient.
- Opened (Local): Time Local Opened for the First Recipient.

Mapping of Message Status to Registered Receipt (Reminder: Set Company Local Time in RPortal)



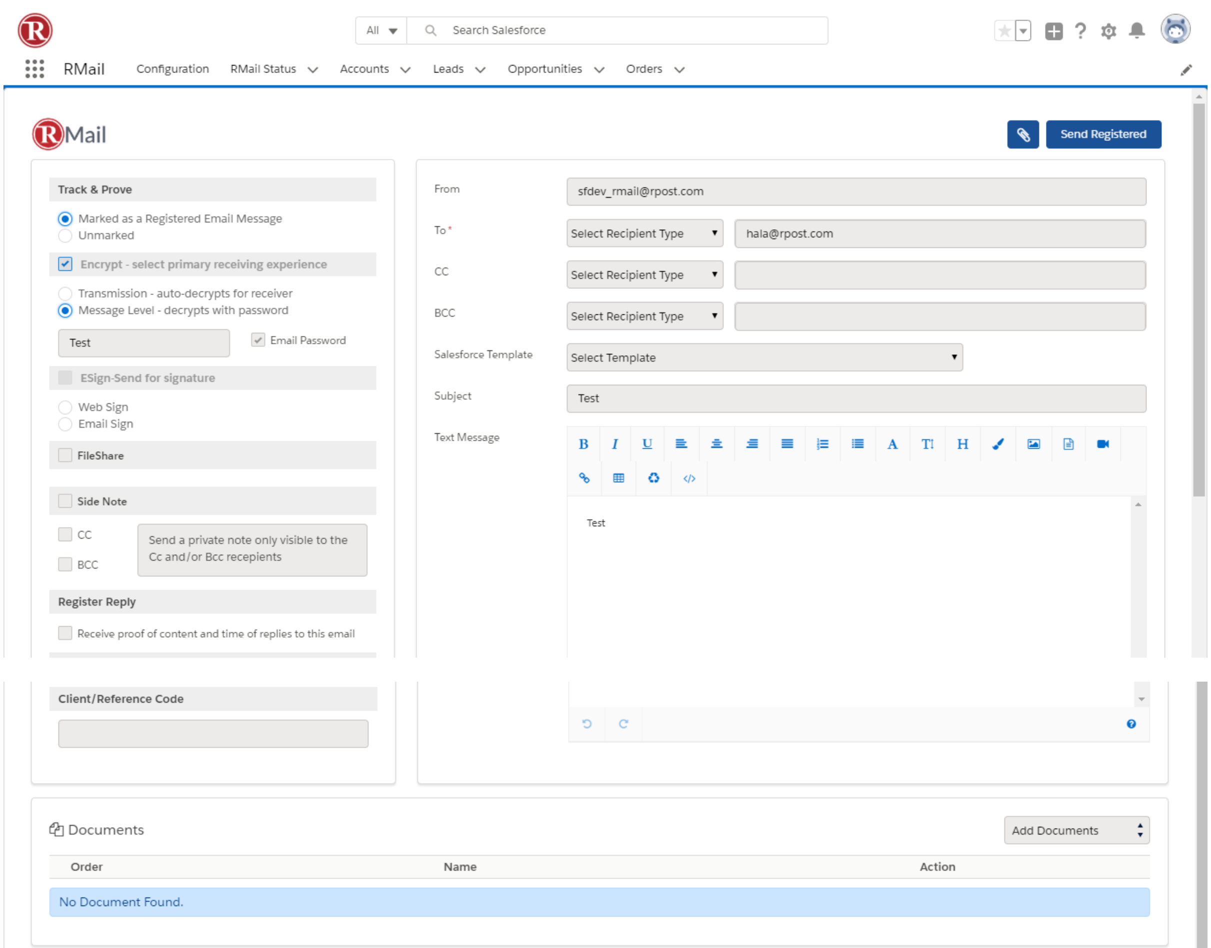
Notes & Attachments <u>inside RMail Status</u>

- **RMail Attachments** copies of attachments are added under Notes and Attachments in the Message Status area for the send.
- **Receipt Zip File for Record Authentication and Delivered Item Re-Generation:** For third-party authentication and regeneration of a record, one can find the Zip file associated with the

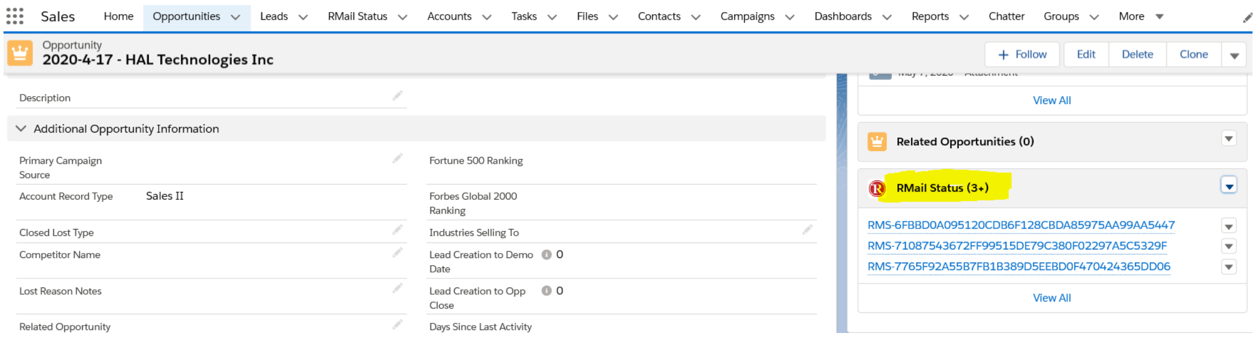
Registered Receipt email, and inside is the EML message format file that may be forwarded to the RMail verification address indicated on the receipt. More information on Receipt Authentication is in the RMail support center.

RMail status tab has some additional options in the upper right.

- **Refresh Receipt:** RMail status information is automatically updated each hour.
  - If a user needs to generate a Registered Receipt more frequently or would like to force the latest RMail Status information to display, the User can click the “Refresh Receipt” button in the upper right of the view.
  - This will refresh RMail Status and retrieve any Registered Receipt email records that have not yet been synchronized.
- **Backfill RMail Data**: On-Click of Backfill RMail Data, the data from the RMail Status tab fields that have been pre-mapped by the Admin to other Salesforce fields will be copied to mapped fields.
- **Resend RMail:** If the status shows delivery failure, a user may one-click Resend RMail (button is in the upper right). When the user clicks on Resend RMail, the User will be redirected to page pre-populated with the values from the original sent message. The user cannot update anything. They can review and then click the Send Registered button to resend the message.



Inside each Object (i.e. Opportunities), the RMail Status tab is also displayed, showing only message status and Registered Receipts associated with that record. The Salesforce Admin can edit the fields that are displayed in this RMail Status view (i.e. Display Subject, Overall Status, etc.).



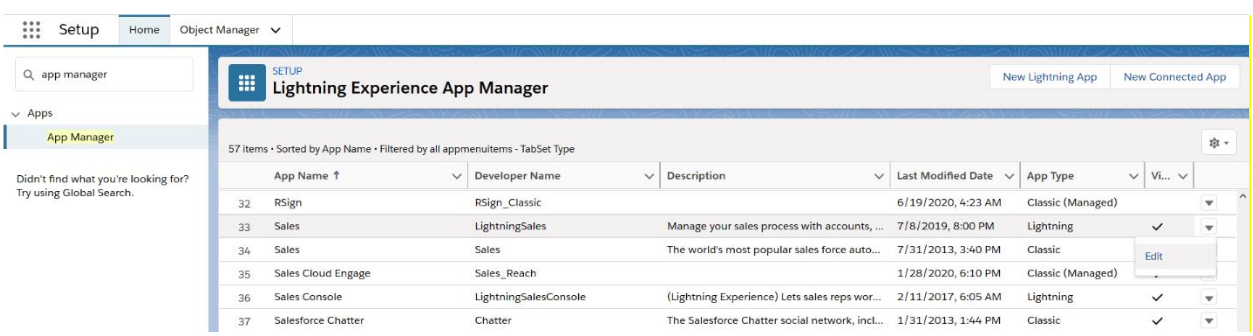
8. Admin Tips

7.1 Add the RMail Status Tab to the app users need

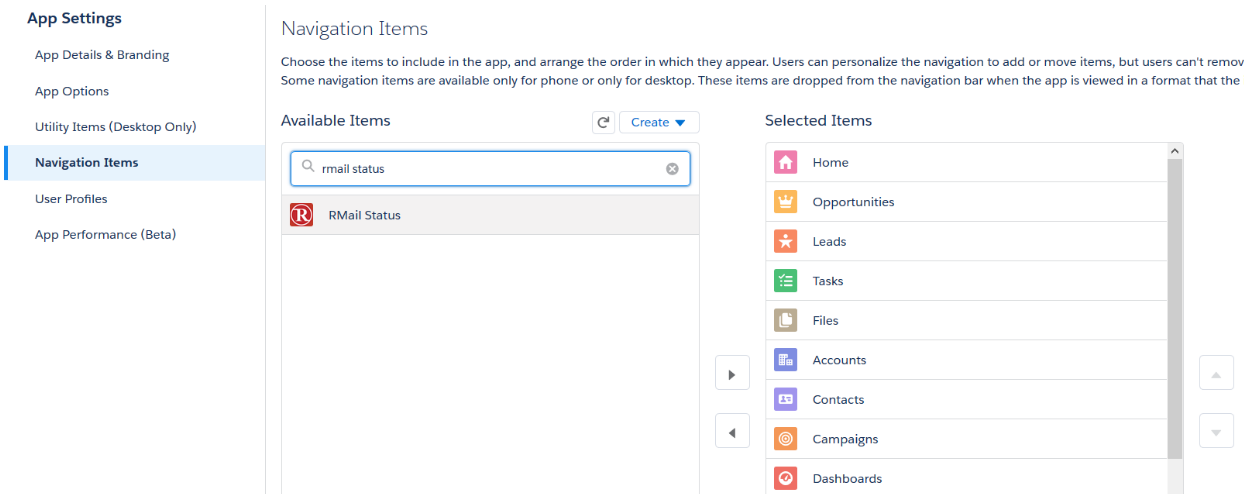
When installing the RMail application, it provides 2 custom object tabs. The **RMail Configuration** tab is very useful for admins, it allows them to customize settings for all users in one place. The **RMail Status** tab will help users see all send information and Registered Receipt proof records as explained in point 6, regardless of the object they are related to.

As an admin, you can add the **RMail Status** tab to the app where users work in a few simple steps whether users prefer Classic or Lightning interface, the steps are the same.

1. Go to **Setup** and search for "**app manager**" in the quick find box.
2. Find the app you want to add the tab to, click the  icon on the right side of the screen and then click **Edit**



3. Go to **Navigation Items**, search for **RMail Status** and add it to the tab list on the right.
4. Move it up or down to place it somewhere handy for users.

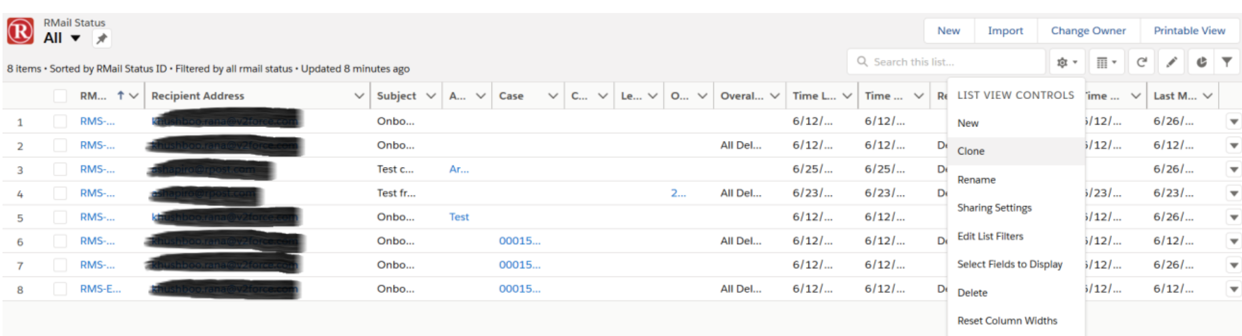


7.2 Create custom views to filter information

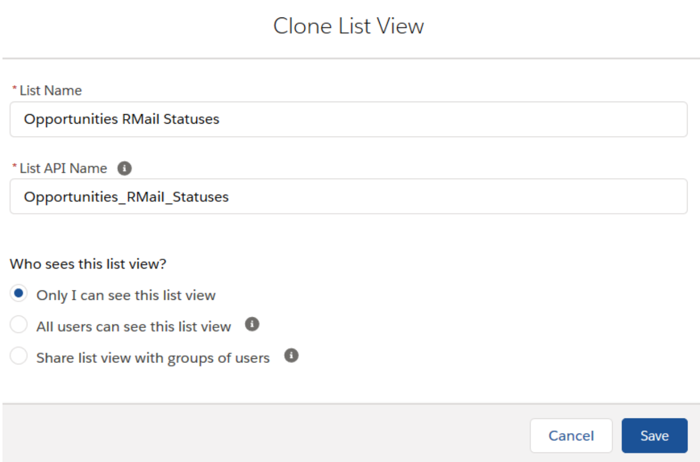
The **RMail Status** tab provides a comfortable way to check statuses and find information. To unlock the full power of this provided feature, you can use **Custom List Views** to enhance the user experience. An admin or a user can follow these instructions.

Upon installation, we provide the **All** view that includes our recommendations on the most important fields so we suggest you save time and clone this list.

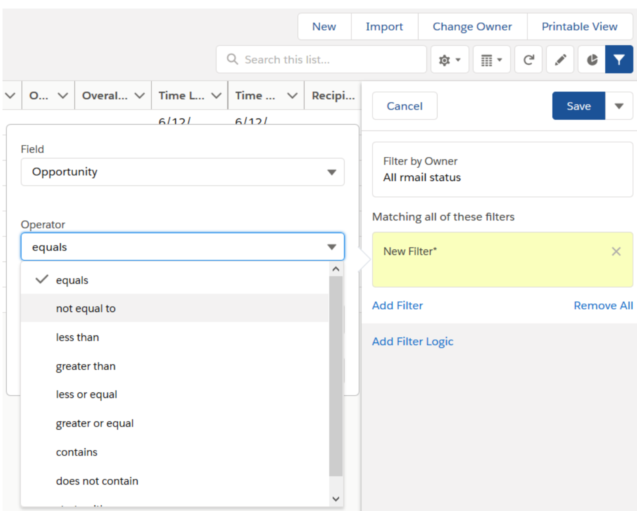
1. Go to the **RMail Status** tab and open the **All** list view.
2. (Lightning only) By default, Salesforce will direct you to the **Recently Viewed** list. Each user can make others be the default by clicking the **pin icon**  next to the list view's name
3. Click on the **gear icon**  and select **Clone**

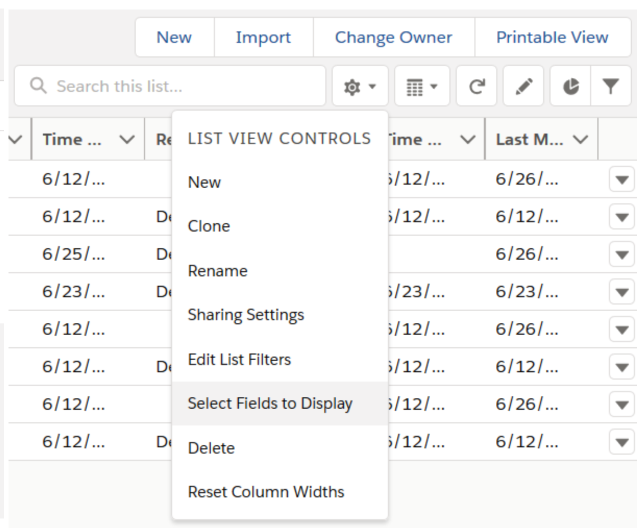


4. Set the name of the list you're creating and check the corresponding visibility options:
   - **Only I can see this list view**: The view won't be available to any other users
   - **All users can see this list view**: The view will be available to all users, even partner and customer community users.
   - **Share list view with groups of users**:



5. Once the view is saved, it will direct you to the new view. Click the **funnel icon**  to add the **filters** you need and the **gear icon**  and **Select Fields to Display** to add / remove fields.





7.3 Display useful columns in related lists

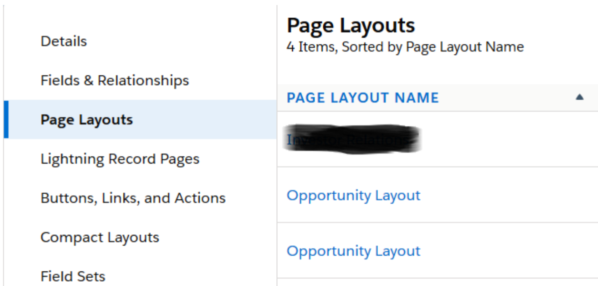
All supported standard objects will have an **RMail Status Related List** available. Once you add it, it's very helpful for your users to see the most useful fields. We recommend you add the following:

- **Subject**
- **Overall Status**
- **Time UTC Opened**
- **Time UTC Delivered**

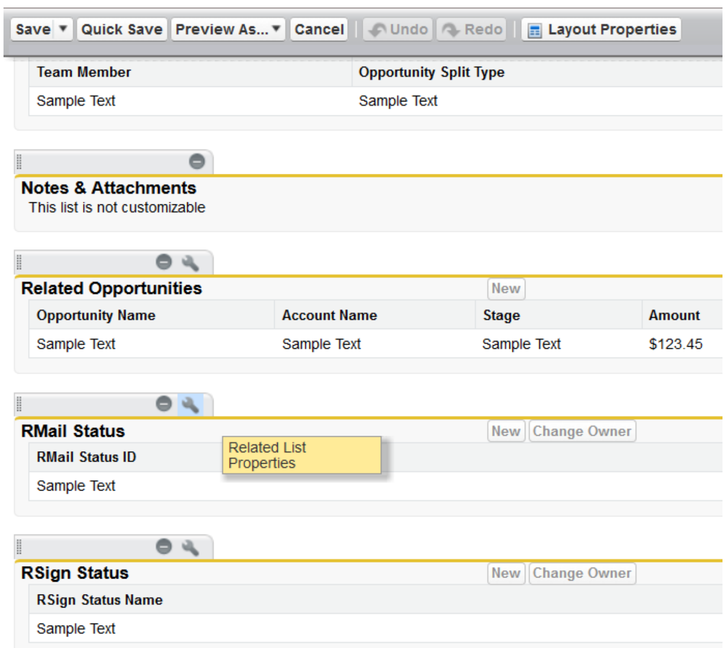
To add fields to a related list:

1. Go to Setup, Object Manager and choose the Lead, Account, Contact, Opportunity or Case Object.

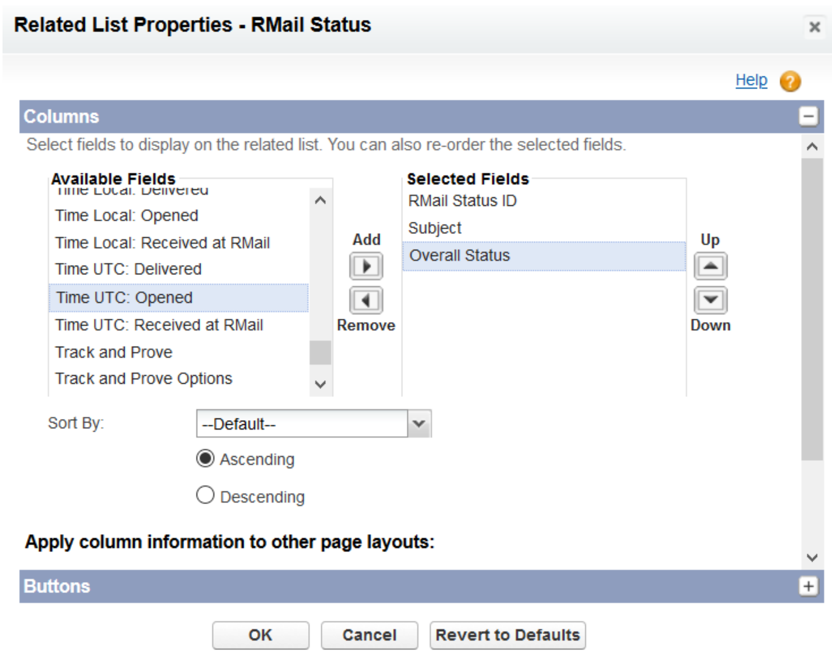
2. Select **Page Layouts** on the left column and click on the name of the page layout you want to edit



3. Scroll down to the Related Lists part and Click on the **wrench icon** to access the list's properties.



4. Select and **add the desired fields** and then choose the sorting criteria selecting one of the fields you added in the **Sort By** option

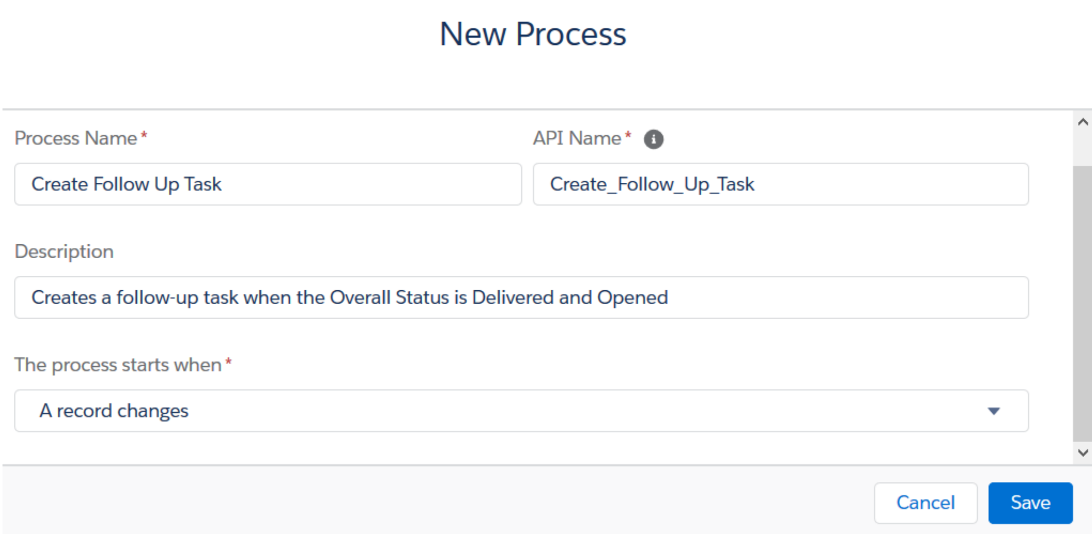


7.4 Create follow-up tasks

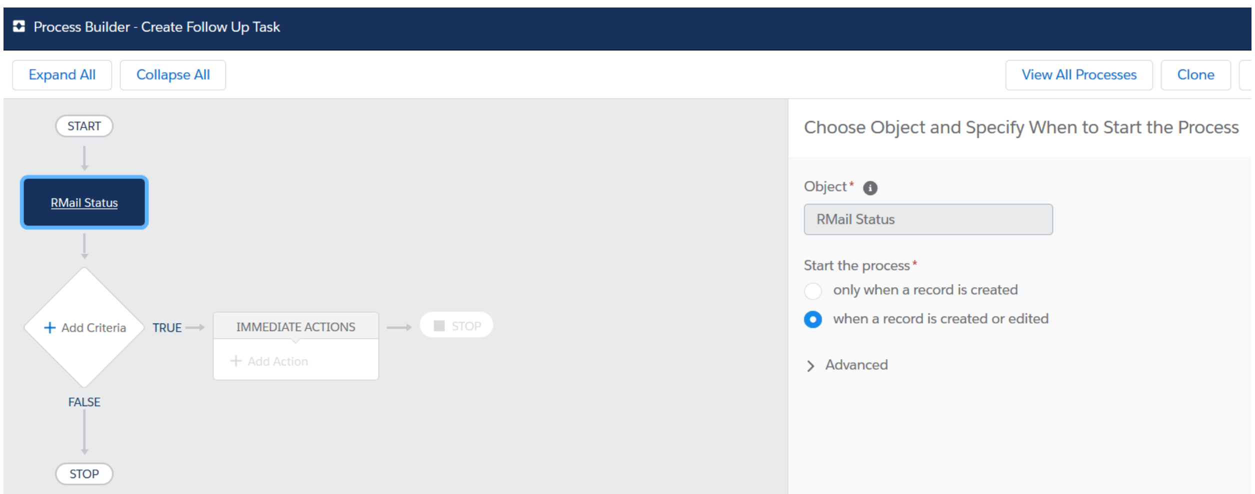
Based on the email tracking information and signature features we provide, you might want to set up automatic **follow-up tasks** assigned to the record owner. For simplicity, we are including steps for **Process Builder** but you can achieve the same results by using **Flows** instead.

To create a **new Process**:

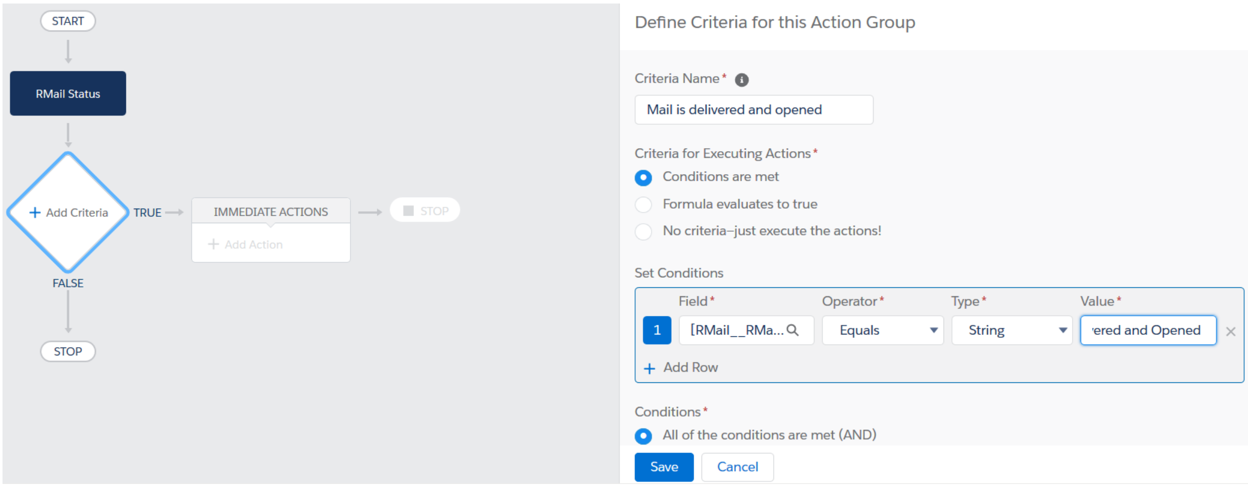
1. Go to **Setup** and search **process builder** in the quick find
2. Click the **New** button to create a new process
   - Choose the **RMail Status** object and click **Next**.
3. Insert a **Process Name** and **Description** for internal reference and documentation.
4. Choose the option The process starts when **A record changes** and click **Save**



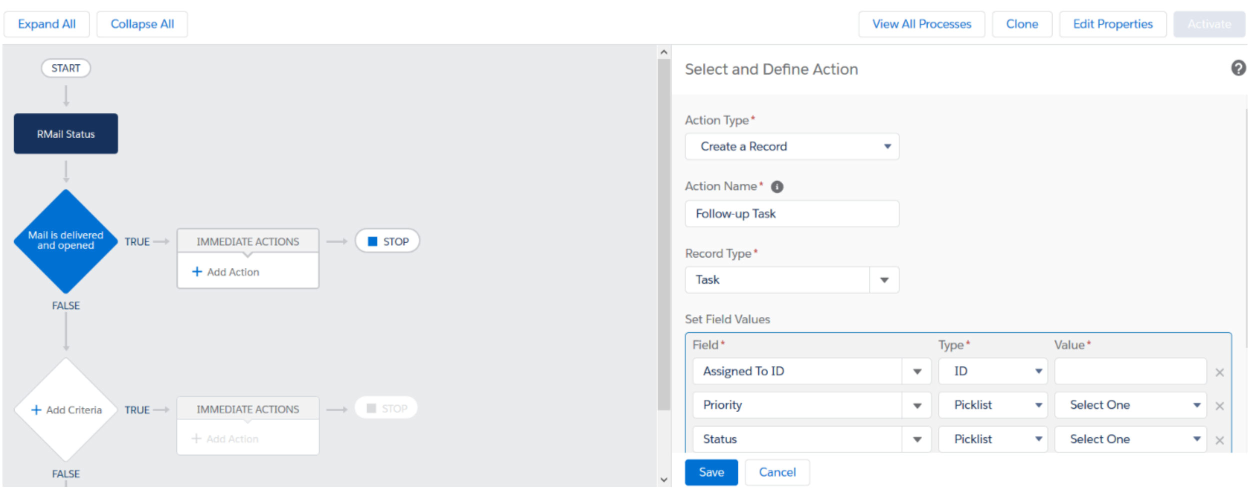
5. Select the **RMail Satus** Object and choose **when a record is created or edited** and click the **Save** button



6. To configure **Add Criteria** and select a **Criteria Name**
7. Choose **Conditions are met**
8. As the condition, choose the **Overall Status** field, **Equals** as Operator, **Type** String and for the value, choose one of the statuses mentioned in point 6 (**All Delivered**, **All Delivered and Opened**, **Delivered (Contains Failure)** or **Completed (Contains Failure)**)
9. Click **Save**



10. Click **Add Action** and select **Action Type**: **Create a Record**
11. Fill the **Action Name** and select **Task** as the **Record Type**
12. Fill the **values** for the **Task fields** and click **Save**
13. Click the **Activate** button



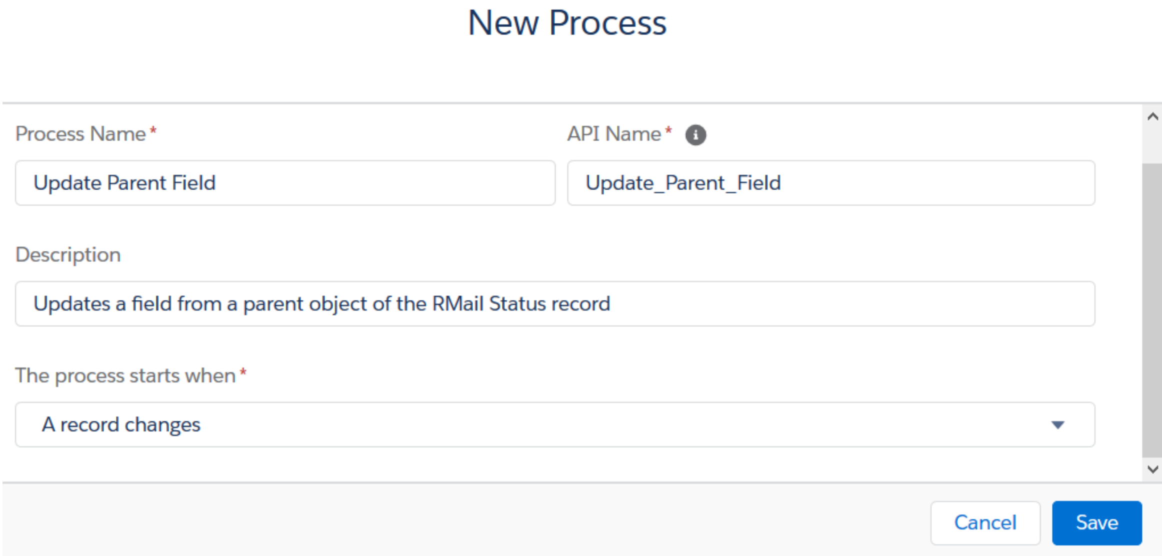
7.5 Update fields on parent records

If you need to update fields on parent records, we got your back. You can use Backfill mapping for Leads, Contacts, Accounts, Opportunities and cases like explained in point 5. However, if you need to do this across other objects, you can use **Process builder** to pass updates up the hierarchy. If you need more complex logic, you can do a lot more by using **Flows**. Since Process Builder is easier to use and understand, we've chosen to show this option in this document.

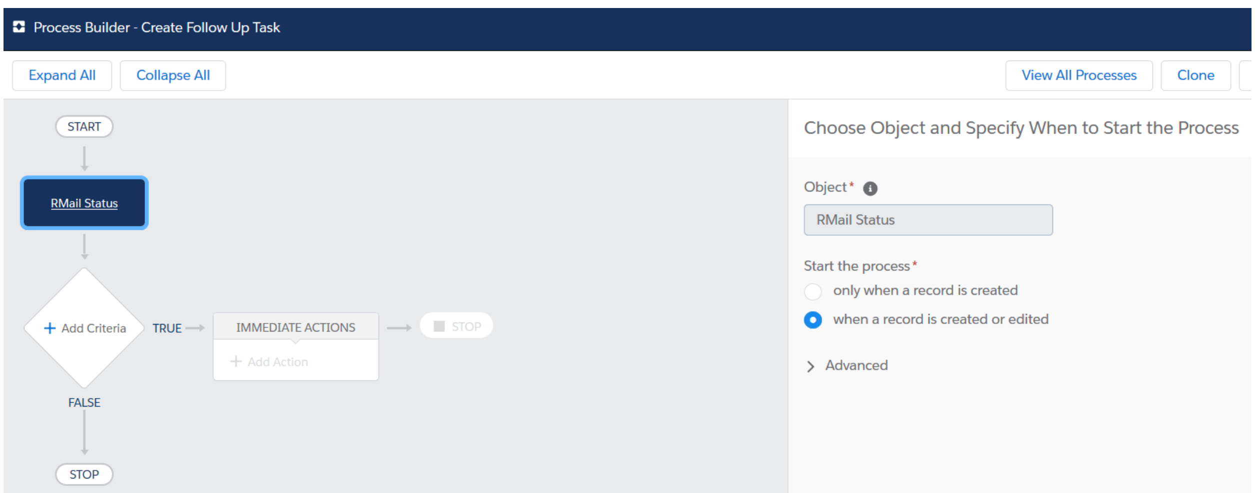
To create a **new Process**:

1. Go to **Setup** and search **process builder** in the quick find
2. Click the **New** button to create a new process
   - Choose the **RMail Status** object and click **Next**.
3. Insert a **Process Name** and **Description** for internal reference and documentation.

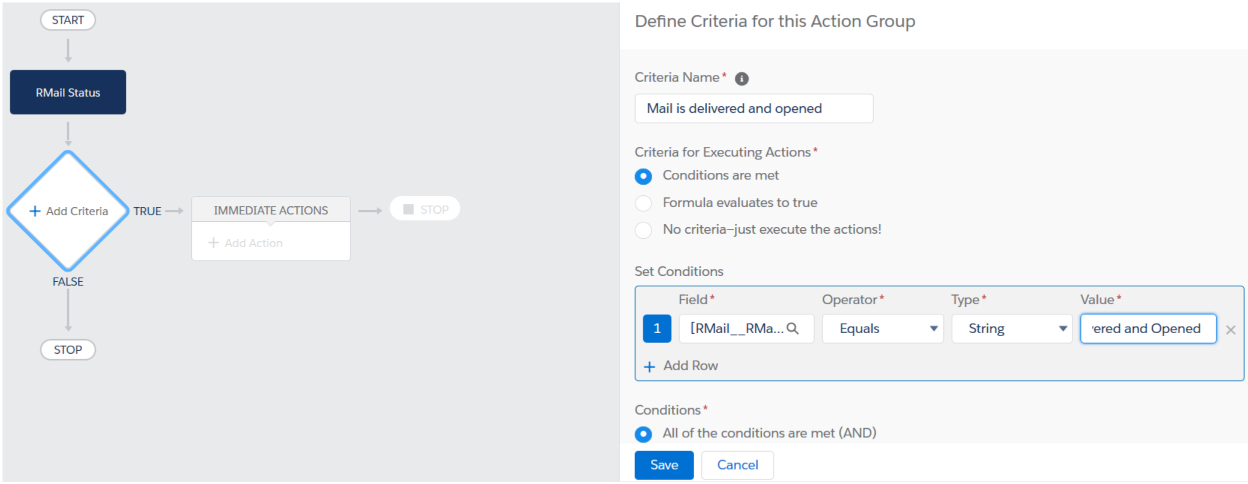
4. Choose the option The process starts when **A record changes** and click **Save**



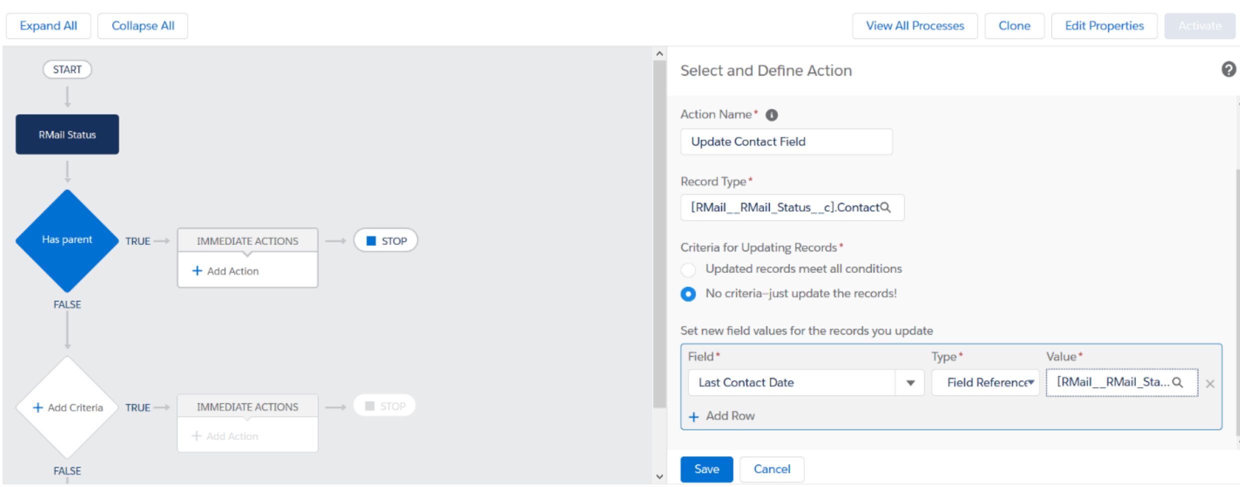
5. Select the **RMail Satus** Object and choose **when a record is created or edited** and click the **Save** button



6. To configure **Add Criteria** and select a **Criteria Name**
7. Choose **Conditions are met**
8. As the condition, choose the **Overall Status** field, **Equals** as Operator, **Type** String and for the value, choose one of the statuses mentioned in point 6 (**All Delivered**, **All Delivered and Opened**, **Delivered (Contains Failure)** or **Completed (Contains Failure)**)
9. Click **Save**



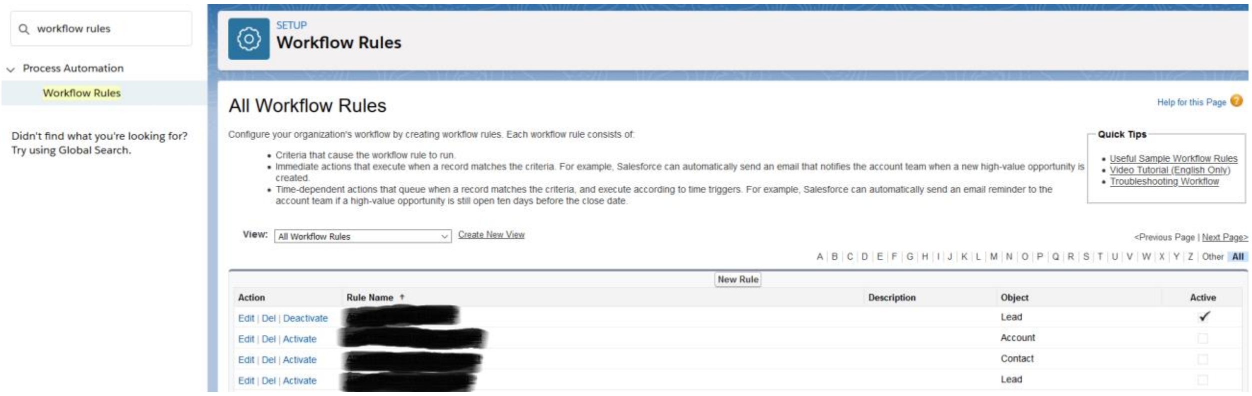
10. Click **Add Action** and select **Action Type**: **Update Records**
11. Fill the **Action Name** and click the **Record Type** field
12. Check **Select a record related to the RMail__RMail_Status__c**
13. Select the related record in which you'd like to update the field. In our example, we'll choose **Contact**, but could be any other related object.
14. If desired, **choose the criteria** to filter the cases that should update the records, else select **No Criteria**. In our example, we will always update the records.
15. Fill the **values** for the **fields** you want to update and click **Save**. In our example, we're passing the value from the **RMail Status - Time Local: Opened** field to the **Contact - Last Contact Date** field
16. Click the **Activate** button



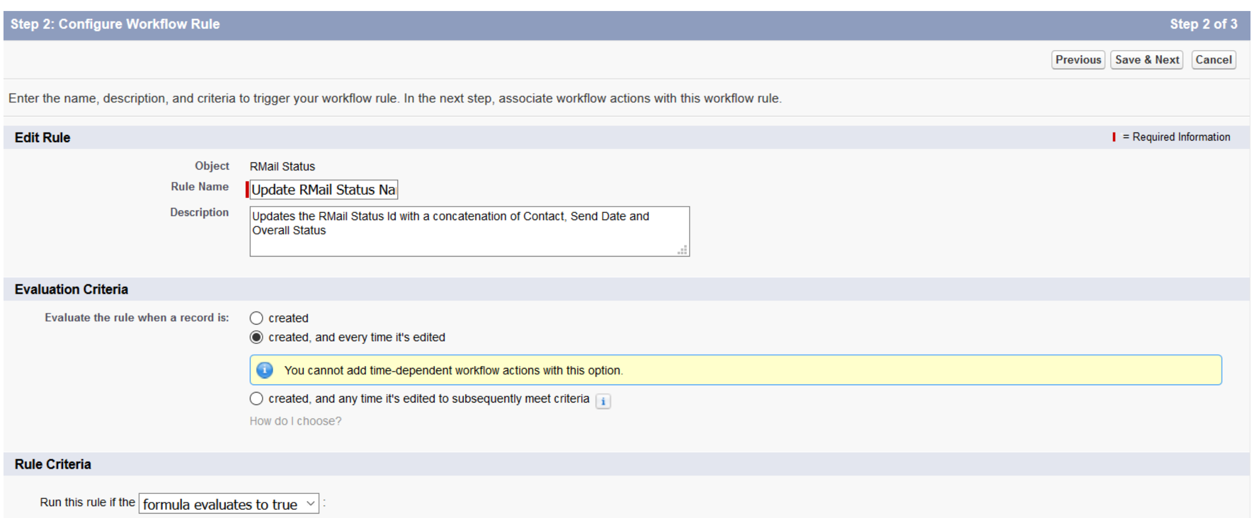
7.6 Change RMail Status Id – automatically or manual

The field **RMail Status Id** will be automatically filled by the prefix **RMS-** and the **Tracking Number**. You can **change the value** in two ways. **Manually** by changing the field value after record creation or **Automatic**. To set up update rules, you can create a simple **workflow**. If you need more complex logic, you can also use Flows or Process Builder.

1. Go to **Setup** and search **Workflow Rules** in the **Quick Find**
2. Click **New Rule**

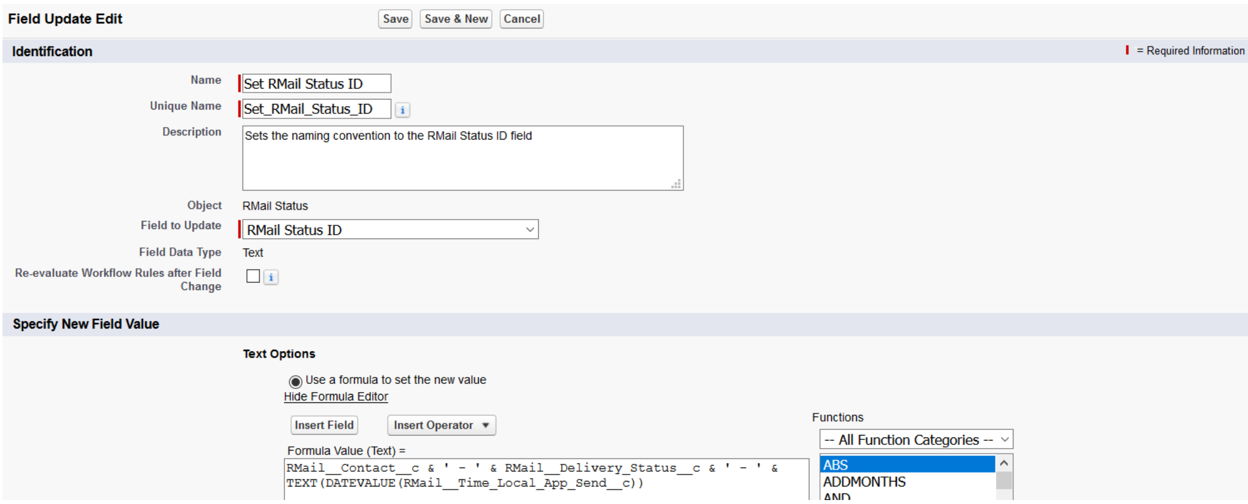


3. Choose the **RMail Status** object and click **Next**
4. Add a **Rule Name** and **Description**
5. Select when to **evaluate the rule criteria** to tell the application when it should execute the actions.
   - **Created**: Only runs at the moment the record is created and won't execute again.
   - **Created, and every time it's edited**: Will run when the record is created and whenever any of the fields change their value. Be careful when choosing this option, it can sometimes cause the rule to trigger actions in unwanted situations.
   - **Created, and any time it's edited to subsequently meet criteria**: Will run when the record is created and run again only if the record didn't meet the criteria before the fields values are updated.
6. Choose **Fields** or **Formula** criteria and set up the conditions that will trigger the rule. Then click **Save & Next**

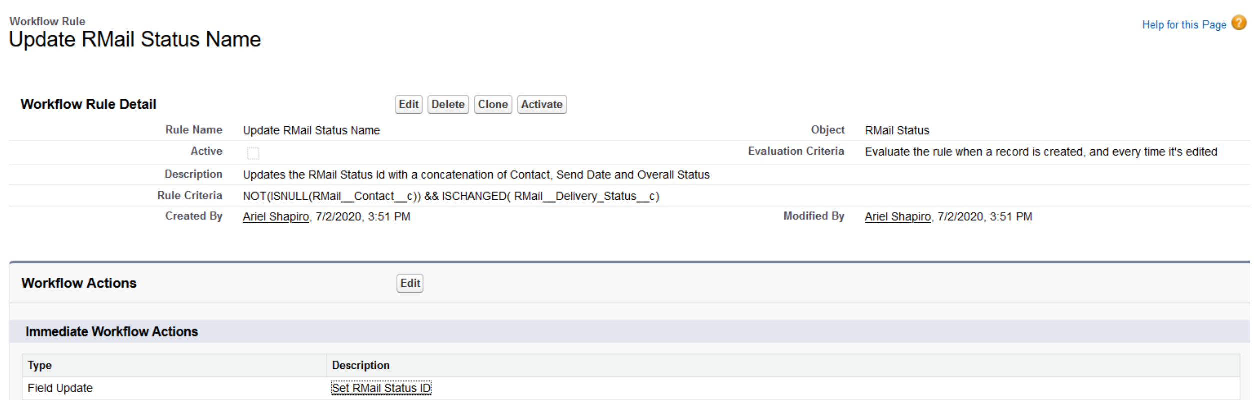


7. Add the **workflow actions** that you need to execute. We'll only create a **Field Update**.
8. Click **Add Workflow Action** and choose **New Field Update**
9. Fill the **Name** and **Description** for the action and click **Use a formula to set the new value**

10. Fill the formula with the **naming convention** you desire and click **Save**. In our example, we are using **RMail__Contact__c & ' - ' & RMail__Delivery_Status__c & ' - ' & TEXT(DATEVALUE(RMail__Time_Local_App_Send__c))** which would look like **John Doe – Delivered and Opened – 2020-01-01**



11. Once you have finished adding actions, click **Done**
12. Click the **Activate** button



7.7 Use E-Sign Tags

When sending documents for **signature** via **RMail**, you can automatically create fields by using **E-Sign tags**. Add simple text to your pdf documents from any pdf generator to automatically create fields for the recipients to fill in the document. Get all required signatures in your documents into a signed pdf with a **Registered Receipt™**. Some examples are:

- **Signature field**: <<Signature1>> (increment number to add more signers, i.e. <<Signature2>>)
- **Name field**: <<Name1>>
- **Title field**: <<Title1>>
- **Date field**: <<Date1>>

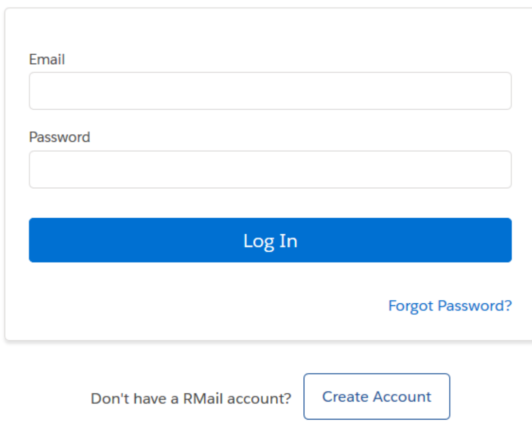
If you are using the **Render as PDF** option in your **visualforce** pages, this is a very useful feature.

7.8 Send RMail emails as any user.

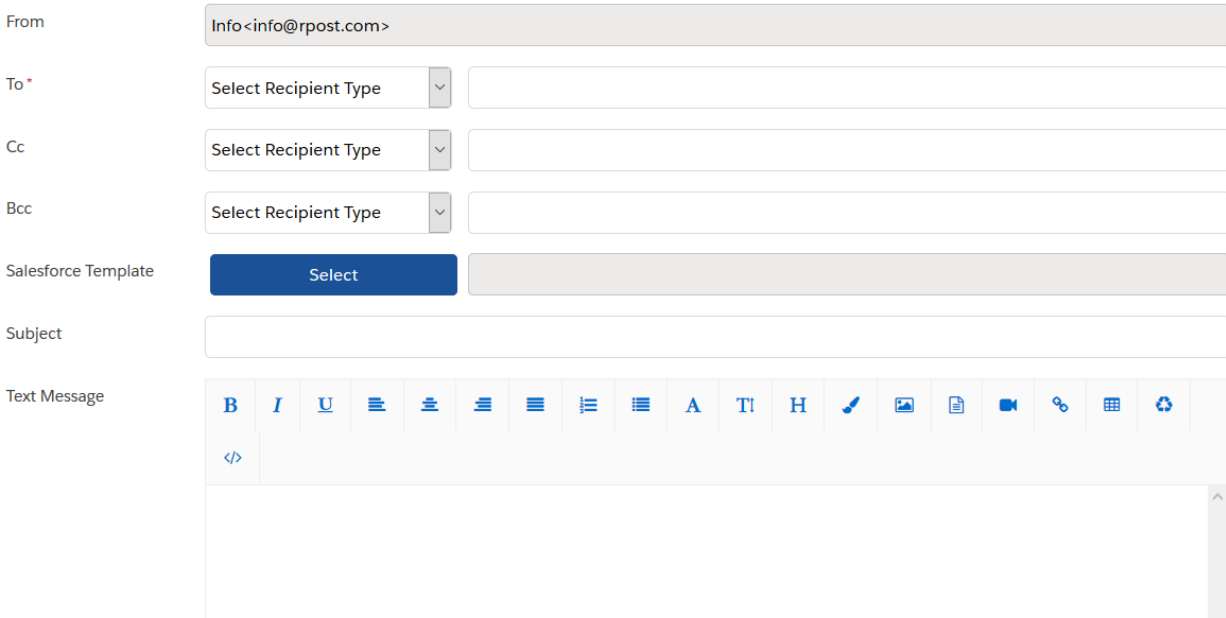
RMail lets you configure the app to be used **not only** under your **Salesforce user**, you can use any **RMail user** to take advantage of general email addresses. To be able to send emails as other RMail users, you need to have an **RMail Shared Volume Service Plan**. This plan allows for you to use shared email addresses.

To log in as a different user in the **RMail Salesforce App** follow these steps:

1. Go to **RMail Configuration** > **Account Details**
2. If a user is already logged in, click **Modify Account Configuration**. If no user has logged in yet, you'll see the login screen directly.



3. Input the **username** and **password** for the **shared email** address' **RMail** account
4. Click the **Send RMail** button in any of the **supported objects** and notice that the **From** email address has changed. Now you can send emails using the **shared account**. You can log in and out of different accounts as much as needed.


From
Info<info@rpost.com>
To *
Select Recipient Type
Cc
Select Recipient Type
Bcc
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Salesforce Template
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Subject
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