Connectors for Office 365 Setup Guide

To enable Signatures for Office 365 to apply signatures to your messages you must ensure that your email flows through the Exclaimer Cloud.

To make this happen you need to create 3 things in your Office 365 portal:

- 1. A "Send" Connector. This redirects each message to the Exclaimer Cloud where the signature is added before it is delivered to the recipient(s).
- 2. A "Receive" Connector. When the Exclaimer Cloud has added the signature, it returns the message back to Office 365 through the Receive Connector.
- 3. A "Transport Rule". This will ensure that each message doesn't get sent more than once to the Exclaimer Cloud.

Follow the step-by-step instructions below or watch our comprehensive video guide, which can be accessed <u>here</u>.

Step 1: Go to the Exchange mail flow section of the Office 365 portal

- a) Sign into your organization's Office 365 tenancy via the Office 365 portal as an Administrator.
- b) At the Home screen, click the icon at the top left of the screen and select the 'Admin' option from the menu that appears:



c) You will now arrive at the 'Office 365 admin center' page. From the menu on the left, go to the 'ADMIN' option and select 'Exchange':



SHARED MAILBOXES

MEETING ROOMS

GROUPS

DOMAINS

PUBLIC WEBSITE

- BILLING
- EXTERNAL SHARING

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SERVICE SETTINGS

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MESSAGE CENTER

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ADMIN

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d) The 'Exchange admin center' page will open. From the menu on the left, select the 'mail flow' option:

| | Office 365 | Admin | | |
|--------|-----------------------|-------------------------|--|--|
| Exc | Exchange admin center | | | |
| dash | board | Welcome | | |
| recip | ients | | | |
| perm | lissions | recipients mailboxes | | |
| comp | pliance management | groups | | |
| orga | nization | contacts | | |
| prote | ection | migration | | |
| mail | flow | | | |
| mobi | le | organization | | |
| publi | c folders | sharing apps | | |
| unifie | ed messaging | | | |

e) You will now arrive at the 'mail flow' page, with a row of options along the top:

| Exchange admin center | | | | |
|-----------------------|--|---|------------|---|
| dashboard | rules m | nessage trace accepted domains remote domains | connectors | |
| recipients | | | | |
| permissions | | | | |
| compliance management | ON | RULE | PRIORITY | * |
| - | There are no items to show in this view. | | | |
| organization | | | | |

Step 2: Set up the 'Send' Connector

| a) . | At the 'mail flow' page Select the 'Connectors' option: | | | | | |
|------|---|---------------|------------------|----------------|------------|--|
| | rules | message trace | accepted domains | remote domains | connectors | |

b) The screen will change to show the Connectors list. Click the '+' icon to start creating the Send Connector:

Connectors help control the flow of email messages to and from your Office 365 organization. However, because most organizations don't need to use connectors, we recommend that you first check to see if you should create a connector.

Want to help us improve connectors? Just send us feedback and let us know what you liked, didn't like, or what we can do to make your experience better.

| STATUS 🔺 | NAME | FROM | то | |
|--|------|------|----|--|
| There are no items to show in this view. | | | | |

c) The Connector creator will appear. On the 'Select your mail flow scenario' page set the 'From' dropdown to 'Office 365' and the 'To' dropdown to 'Your organization's email server' and then click 'Next':

| Select your mail flow scenario | | | |
|--|--|--|--|
| Specify your mail flow scenario, and we'll let you know if you need to set up a connector. Learn more | | | |
| From: | | | |
| To: | | | |
| Your organization's email server \checkmark | | | |
| You need to create a connector for this mail flow scenario. Because your domain's MX record points to Office 365, you must set up an alternative server (called a smart host) so that Office 365 can send email to your organization's email server (also called on-premises server). To complete the scenario, you might need to configure your email server to accept messages delivered by Office 365. Learn more about configuring your email server | | | |
| Next Cancel | | | |

d) On the next page give your Send Connector a descriptive name and, optionally, a more detailed description. Ensure that you leave the two checkboxes enabled, then click '**Next**':

| New connector |
|---|
| This connector lets Office 365 deliver messages to your organization's email server. |
| *Name: |
| Send to Exclaimer Cloud |
| Description: |
| Connector for my Office 365 signatures |
| |
| |
| What do you want to do after connector is saved? |
| Retain internal Exchange email headers (recommended) |
| Next Cancel |

e) On the next page select the radio option 'Only when I have a transport rule set up that redirects messages to this connector', then click 'Next' (you will set up the transport rule in Step 4):

| New connector | | | | |
|---|--------|--|--|--|
| When do you want to use this connector? | | | | |
| Only when I have a transport rule set up that redirects messages to this connector | | | | |
| For email messages sent to all accepted do in your organization | omains | | | |
| Only when email messages are sent to these domains | | | | |
| + / - | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Back Next | Cancel | | | |

f) Next you will be asked how to route messages. Click the '+' icon to add a smart host to this list:

| New connector |
|--|
| How do you want to route email messages? |
| Specify one or more smart hosts to which Office 365 will deliver email messages. A smart host is an alternative server and can be identified by using a fully qualified domain name (FQDN) or an IP address. Learn more |
| T |
| |
| Back Next Cancel |

g) In the 'add smart host' box that pops up, enter smtp.au1.exclaimer.net then click 'Save':

| add smart host | |
|---|------------------------------|
| Specify the smart host's fully qualified domain Example: myhost.contoso.com or 192.168.3.2 | name (FQDN) or IPv4 address. |
| smtp.au1.exclaimer.net | |
| | Save Cancel |

h) You will be returned to the smart host list with your entry now present. Click 'Next':

| Nev | w connector | | | | |
|--|--|------|--------|--|--|
| How o | How do you want to route email messages? | | | | |
| Specify one or more smart hosts to which Office 365 will deliver email messages. A smart host is an alternative server and can be identified by using a fully qualified domain name (FODN) or an IP address. Learn more | | | | | |
| + . | / - | | | | |
| smtp | .au1.exclaimer.net | | | | |
| | | | | | |
| | Back | Next | Cancel | | |

i) The next page relates to the security of the connection. Leave the 'Always use Transport Layer Security (TLS)' option checked, and ensure that the 'Issued by a trusted certificate authority (CA)' radio option is selected. Click 'Next':

| New connector | | | | |
|--|--------|--|--|--|
| How should Office 365 connect to your email server? | | | | |
| Always use Transport Layer Security (TLS) to secure the connection (recommended) | | | | |
| Connect only if the recipient's email server certificate matches this criteria | | | | |
| Any digital certificate, including self-signed certificates | | | | |
| Issued by a trusted certificate authority (CA) | | | | |
| And the subject name or subject alternative name (SAN) matches this domain name: | | | | |
| Example: contoso.com or *.contoso.com | | | | |
| | | | | |
| Back Next | Cancel | | | |

j) The confirmation page will appear. Confirm that the settings are correct then click 'Next':

| New connector | | | |
|--|--|--|--|
| Confirm your settings Before we validate this connector for you, make sure these are the settings you want to configure. | | | |
| Mail flow scenario | | | |
| From: Office 365 | | | |
| To: Your organization's email server | | | |
| Name | | | |
| | | | |
| Send to Exclaimer Cloud | | | |
| Description | | | |
| Connector for my Office 365 signatures | | | |
| | | | |
| Status | | | |
| Turn it on after saving | | | |
| | | | |
| When to use the connector | | | |
| Use only when I have a transport rule set up that redirects messages to this | | | |
| connector. | | | |
| Pouting method | | | |
| Routing method | | | |
| Route email messages through these smart hosts: smtp.eu i.exclaimer.net | | | |
| | | | |
| Security restrictions | | | |
| Always use Transport Layer Security (TLS) and connect only if the recipient's email server certificate is issued by a trusted certificate authority (CA). | | | |
| | | | |
| Back Next Cancel | | | |

k) The connector validation page will appear, which requires you to send a test message. Click the '+' icon to specify an email recipient for the test message:

| New connector | |
|--|--|
| Validate this connector | |
| We'll validate this connector for you to make sure it works as exp you'll need to provide one or more email addresses so we can see | ected, but first nd a test message. |
| add multiple addresses if your organization has more than one de | ill server. You can omain. |
| | |
| | |
| | |
| Back Validate | Cancel |

In the 'add email' box that pops up, enter the email address of the recipient of your test mail (note that this email address must <u>not</u> belong to an Office 365 mailbox), then click 'OK':

| add email | |
|--|-----------|
| Send the test email to this address: karen@greenorg.net | |
| | OK Cancel |

m) You will be returned to the connector validation page with your email entry now present. Click 'Validate':

| New connector |
|---|
| Validate this connector |
| We'll validate this connector for you to make sure it works as expected, but first you'll need to provide one or more email addresses so we can send a test message. |
| Specify an email address for an active mailbox that's on your email server. You can add multiple addresses if your organization has more than one domain. |
| + 🖉 - |
| karen@greenorg.net |

| Back | Validate | Cancel |
|------|----------|--------|

n) The validation process will start:

| New co | nnector | | | |
|------------------------------|---|----------------------------|---|-------------------|
| Validate th | s connector | | | |
| We'll validat you'll need | e this connector for you to m o provide one or more email | ake sure it addresses | works as expected, but so we can send a test r | first nessage. |
| Specify an e add multiple | mail address for an active ma addresses if vour organization | ilbox that's on has mor | on your email server. e than one domain. | /ou can |
| + ✓ karen@gr | Step 1 of 3: Validating Click 'Stop' to cancel t won't undo the chang | he operatio | t on. Stopping the operat applied. stop | tion |
| | D | ack | Validate | Cancel |
| | B | duk | Validate | Cancer |

o) When it has finished, click 'Close', then click 'Save' to complete the creation of the Send Connector:

| Done! | |
|---------------------------------|-------|
| You've completed the operation | |
| rou ve completed the operation. | |
| | |
| | |
| | |
| | Close |
| | |

NOTE: Microsoft advise that a newly created Connector may take as long as 15 minutes to become operational.

Step 3: Set up the 'Receive' Connector

a) Having completed the setup of the Send Connector you should now be back at the 'Connectors' section of the 'mail flow' page. Click the '+' icon to start creating the Receive Connector:

| rules me | essage trace accep | oted domains rem | ote domains | connectors |
|---|---|---|---|--|
| Connectors h connectors, v Want to help | elp control the flow of emai re recommend that you first us improve connectors? Jus | il messages to and from yo t check to see if you should at send us feedback and let | ur Office 365 organ create a connector us know what you | anization. However, because most organizations don't need to use or. u liked, didn't like, or what we can do to make your experience better. |
| STATUS 🔺 | NAME | FROM | то | |
| On | Send to Exclaimer Cloud | Office 365 | Your organizat | ation" Send to Exclaimer Cloud Mail flow scenario From: Office 365 To: Your organization's email server |

b) The Connector creator will appear. On the 'Select your mail flow scenario' page set the 'From' dropdown to 'Your organization's email server' and the 'To' dropdown to 'Office 365' and then click 'Next':

| Select your mail flow scenario | | | | |
|--|--|--|--|--|
| Specify your mail flow scenario, and we'll let you know if you need to set up a connector. Learn more | | | | |
| From: Your organization's email server 💙 | | | | |
| To: Office 365 | | | | |
| You need to create a connector for this mail flow scenario. When this connector is set up, Office 365 will accept messages from your organization's email server and send the messages to recipients on your behalf. To complete this scenario, you'll also need to configure your email server to send email messages directly to Office 365. Learn more about configuring your email server | | | | |
| Next Cancel | | | | |

c) On the next page give your Receive Connector a descriptive name and, optionally, a more detailed description. Ensure that the '**Turn it on**' option is checked and that the '**Retain internal Exchange email headers (recommended)**' is unchecked, then click '**Next**':

| New connector | | | |
|--|-------------------------|--|--|
| This connector lets Office 365 accept messages from your organization's e (also called an on-premises server). | t email email server | | |
| *Name: | | | |
| Receive from Exclaimer Cloud | | | |
| Description: | | | |
| Connector to receive messages after have been applied | r signatures | | |
| What do you want to do after connector is saved? Turn it on Retain internal Exchange email headers (recommended) | | | |
| (reconniciacu) | | | |
| Next | Cancel | | |

d) On the next page select the radio option 'By verifying that the subject name on the certificate that the sending server uses to authenticate with Office 365 matches this domain name (recommended)'. In the field below, enter smtp.exclaimer.net then click 'Next':

| New connector | |
|---|--|
| How should Office 365 identify email from your email server? | |
| By verifying that the subject name on the certificate that the sending server uses to authenticate with Office 365 matches this domain name (recommended) | |
| smtp.exclaimer.net | |
| By verifying that the IP address of the sending server matches one of these IP addresses that belong to your organization + - | |
| G Office 365 will only accept messages through this connector if the sender domain is configured as an accepted domain for your Office 365 organization. Learn more | |
| Back Next Cancel | |

e) The confirmation page will appear. Confirm that the settings are correct then click 'Save':

New connector

Confirm your settings Before saving, make sure these are the settings you want to configure.

Mail flow scenario From: Your organization's email server To: Office 365

Name Receive from Exclaimer Cloud

Description

Connector to receive messages after signatures have been applied

Status

Turn it on after saving

How to identify email sent from your email server

Identify email coming from your email server by verifying the subject name on the connecting TLS certificate matches this domain: smtp.exclaimer.net, and the sender domain is an accepted domain for your organization.

Back Save C

Cancel

f) Having completed the setup of the Receive Connector you should now be back at the 'Connectors' section of the 'mail flow' page with your Send and Receive connectors both listed:

| rules me | essage trace accepted (| domains remote domains | connectors | | |
|-------------------------------|---|--------------------------------------|---|--|--|
| Connectors h connectors, v | Connectors help control the flow of email messages to and from your Office 365 organization. However, because most organizations don't need to use connectors, we recommend that you first check to see if you should create a connector. | | | | |
| Want to help better. | us improve connectors? Just send | us feedback and let us know what you | liked, didn't like, or what we can do t | o make your experience | |
| + 🖍 🖮 | G | | | | |
| STATUS 🔺 | NAME | FROM | то | | |
| On | Receive from Exclaimer Cloud | Your organization's email server | Office 365 | Receive from Exclaimer Cloud | |
| 0.1 | | onice 505 | four organization s circuit server | Mail flow scenario | |
| | | | | From: Your organization's email server | |
| | | | | To: Office 365 | |
| | | | | Description | |
| | | | | Connector to receive messages after signatures have been applied | |

NOTE: Microsoft advise that a newly created Connector may take as long as 15 minutes to become operational.

Step 4: Create the Transport Rule

a) Having completed the setup of the Receive Connector you should now be back at the 'Connectors' section of the 'mail flow' page. From the row of options along the top, select 'rules':



b) The screen will change to show the Rules list. Click the '+' icon and select 'Create a new rule...' from the dropdown menu:

| rules message trace accepted domains remote | domains connectors |
|--|--|
| | |
| | |
| +- ∕ 🖻 🖮 ↑ ↓ 🖬 - ዖ 😂 | _ |
| Create a new rule | |
| Apply rights protection to messages | ere are no items to show in this view. |
| Apply disclaimers | |
| Bypass spam filtering | |
| Filter messages by size | |
| Generate an incident report when sensitive information is detected | |
| Modify messages | |
| Restrict managers and their direct reports | |
| Restrict messages by sender or recipient | |
| Send messages to a moderator | |
| Send messages and save a copy for review | |
| | - |

c) The Rule creator will appear. Give your rule a descriptive name and then click the '**More options...**' hyperlink:

| aentity messages to send to | o Exclaimer Cloud | × |
|--|-------------------------|--------------|
| Apply this rule if | | |
| select one | | • |
| Do the following | | |
| elect one | | - |
| hoose a mode for this rule: Enforce Test with Policy Tips | | |
| O Test without Policy Tips | | |
| e options | (RMS) is a premium feat | ure that red |

d) From the 'Apply this rule if...' dropdown, select 'The sender...' and then 'is external/internal':

| ame: | | |
|---|--|--|
| dentify messages to send to Exclaimer Cloud | | |
| Apply this rule if | | |
| Select one | • | |
| Select one | | |
| The sender | is this person | |
| The recipient | ▶ is external/internal | |
| The subject or body | is a member of this group | |
| Any attachment | address includes any of these words | |
| Any recipient | address matches any of these text patterns | |
| The message | is on a recipient's supervision list | |
| The sender and the recipient | has specific properties including any of these words | |
| The message properties | has specific properties matching these text patterns | |
| A message header | has overridden the Policy Tip | |
| [Apply to all messages] | IP address is in any of these ranges or exactly matches | |
| operaes of any fale. | domain is | |
| Audit this rule with severity level: | | |
| Not specified 👻 | | |
| | | |
| hoose a mode for this rule: | | |
| Enforce | | |
| C Test with Policy Tips | | |
| C Test without Policy Tips | | |

e) In the 'select sender location' box that pops up, ensure that 'Inside the organization' is selected, then click 'OK':

| Name: | | |
|-----------------------------------|-------------------------|--------|
| Identify messages to send to Excl | laimer Cloud | |
| *Apply this rule if | | |
| The sender is located | ✓ * <u>Select o</u> | ne |
| add condition | | |
| *Do the following | | × |
| Select one | select sender location | |
| add action | | |
| | Inside the organization | \sim |
| Except if | | |
| add exception | | |
| | OK Cancel | |
| Properties of this rule: | | |
| Audit this rule with severity le | evel: | |
| Not specified 🔻 | | |
| Choose a mode for this rule: | | |
| Enforce | | |
| Test with Policy Tips | | |
| Test without Policy Tips | | |

f) From the 'Do the following...' dropdown, select 'Redirect the message to...' and then 'the following connector':

| Name: | | | |
|--|--------|------------------|--------------|
| Identify messages to send to Exclaimer Cloud | | | |
| Apply this rule if | | | |
| The sender is located | - | Inside the | organization |
| add condition | | | |
| *Do the following | | | |
| Select one | • |] | |
| Select one | | | |
| Forward the message for approval | • | | |
| Redirect the message to | • | these recipients | 5 |
| Block the message | Þ | hosted quarant | ine |
| Add recipients | • | the following c | onnector |
| Apply a disclaimer to the message | , , | | |
| Modify the message properties | • | | |
| Modify the message security | • | | |
| Prepend the subject of the message with | | | |
| Notify the sender with a Policy Tip | | | |
| Generate incident report and send it to | | | |
| Notify the recipient with a message | | | |
| | | | |
| O Test with Policy Tips | | | |

g) In the 'select connector' box that pops up, ensure that the Send connector that you created in Step 2 is selected, then click 'OK':

'n.

| Name: | |
|-------------------------------------|---|
| Identify messages to send to Exclai | imer Cloud |
| *Apply this rule if | |
| The sender is located | Inside the organization |
| add condition | |
| *Do the following | × |
| Use the following connector | |
| add action | Connector: |
| Except if | Send to Exclaimer Cloud |
| add exception | OK Cancel |
| Properties of this rule: | |
| Audit this rule with severity lev | vel: |
| Not specified 🔻 | |
| Choose a mode for this rule: | |
| Enforce | |
| Test with Policy Tips | |

h) Now click the 'add exception' button:

| ew rule | |
|--|-------------------------|
| Name: | |
| Identify messages to send to Exclaimer Cloud | |
| *Apply this rule if | |
| The sender is located | Inside the organization |
| add condition | |
| *Do the following | |
| Use the following connector | Send to Exclaimer Clou |
| add action | |
| Europet if | |
| add exception | |
| Properties of this rule: | |
| Audit this rule with severity level | |
| Not specified | |
| Choose a mode for this rule: | |
| ● Enforce | |
| ○ Test with Policy Tips | |
| ○ Test without Policy Tips | |
| | Save Cancel |

i) From the 'Except if...' dropdown, select 'A message header...' and then 'matches these text patterns':

| ne | ew rule | | |
|----|--|---|-------------------------|
| | Name: | | |
| | Identify messages to send to Exclaimer Cloud | | |
| | *Apply this rule if | | |
| | The sender is located | • | Inside the organization |
| | add condition | | |
| | *Do the following Use the following connector | • | Send to Exclaimer Cloud |
| | add action | | |
| | Except if | | |
| × | Select one | - | |
| | Select one | | |
| | The sender | • | |
| | The recipient | • | |
| | The subject or body | • | |
| | Any attachment | • | |

| Any recipient | • | | |
|------------------------------|---|-----------------------------|--|
| The message | • | | |
| The sender and the recipient | • | | |
| The message properties | • | | |
| A message header | • | includes any of these words | |
| O Test without Policy Tips | | matches these text patterns | |
| | | | |
| | | Save Cancel | |
| | | Cancer | |

| new rule | |
|--|--|
| Name: | |
| Identify messages to send to Exclaimer Cloud | |
| *Apply this rule if | |
| The sender is located | Inside the organization |
| add condition | |
| *Do the following | |
| Use the following connector | Send to Exclaimer Cloud |
| add action | |
| Except if | |
| × A message header matches | *Enter text eader matches *Enter text patterns |
| add exception | |
| Properties of this rule: | |
| Audit this rule with severity level: | |
| Not specified 🔻 | |
| Choose a mode for this rule: | |
| Enforce | |
| O Test with Policy Tips | |
| O Test without Policy Tips | |
| | Save Cancel |

k) In the 'specify header name' box that pops up enter X-ExclaimerHostedSignatures-MessageProcessed then click 'OK':

| ne | ew rule | | | | | |
|----|-----------------------------|-------------------------------|--------------------|--------|------|-------------------------|
| | Name: | | | | | |
| | Identify messages to send | to Exclaimer Cloud | | | | |
| | *Apply this rule if | | | | | |
| | The sender is located | | - | | | |
| | add condition | | | | | |
| | *Do the following | | | | | |
| | Use the following conne | | | | × | |
| | add action | specity header name | | | | |
| | Except if | X-ExclaimerHostedSignatures-N | MessageProcessed × | | | |
| × | A message header matcl | | nes * <u>Enter</u> | | | es *Enter text patterns |
| | add exception | | OK | Cancel | | |
| | Properties of this rule: | | | | | |
| | Audit this rule with se | verity level: | | | | |
| | Not specified 👻 | | | | | |
| | Choose a mode for this rule | e: | | | | |
| | Enforce | | | | | |
| | Test with Policy Tips | | | | | |
| | Test without Policy Tips | 5 | | | | |
| | | | | | Save | Cancel |

| new rule | |
|--|---|
| Name: | |
| Identify messages to send to Exclaimer Cloud | |
| *Apply this rule if | |
| The sender is located | Inside the organization |
| add condition | |
| *Do the following | |
| Use the following connector | Send to Exclaimer Cloud |
| add action | |
| Except if | |
| ★ A message header matches | <u>'X-ExclaimerHostedSignatures-MessageProcessed'</u> |
| add exception | neader matches |
| Properties of this rule: | |
| Audit this rule with severity level: | |
| Choose a mode for this rule: Enforce | |
| O Test with Policy Tips | |
| O Test without Policy Tips | |
| | Save Cancel |

m) In the 'specify words or phrases' box that pops up, enter true (in lower case), click the '+' icon to add the phrase to the list, and then click the 'OK' button:

| new rule | | |
|-----------------------------|--------------------------|--|
| Name: | | |
| Identify messages to send t | o Exclaimer Cloud | |
| *Apply this rule if | | |
| The sender is located | | × |
| add condition | specify words or phrases | |
| *Do the following | / — | _ |
| Use the following connect | true 🕇 | <u>i</u> |
| add action | | |
| Except if | | |
| X A message header matche | | atures-MessageProcessed' ext patterns |
| add exception | | |
| Properties of this rule: | | |
| Audit this rule with sev | OK Cancel | |
| Not specified 👻 | Conten | |
| Choose a mode for this rule | | |
| Enforce | | |
| Test with Policy Tips | | |
| Test without Policy Tips | | |
| | Sé | ave Cancel |

n) Now click the 'add exception' button again and from the 'or...' dropdown, select 'The sender...' and then 'address matches any of these text patterns':

| new rule | |
|--|--|
| Name: Identify messages to send to Exclaimer Cloud *Apply this rule if The sender is located add condition | ✓ Inside the organization |
| *Do the following Use the following connector add action Except if X Message header matches | Send to Exclaimer Cloud 'X-ExclaimerHostedSignatures-MessageProcessed' |
| or Select one Select one The sender | is this person |
| The recipient The subject or body Any attachment Any recipient The message The sender and the recipient The message properties | is external/internal is a member of this group address includes any of these words address matches any of these text patterns is on a recipient's supervision list has specific properties including any of these words has specific properties matching these text patterns |
| A message header O Test without Policy Tips Activate this rule on the following date: | has overridden the Policy Tip IP address is in any of these ranges or exactly matches domain is Save Cancel |

o) In the 'specify words or phrases' box that pops up, enter <>, click the '+' icon to add the phrase to the list, and then click the 'OK' button:

| new r | rule | | | | |
|--------------|---------------------------|-----------------------|--|--------------|---------------------|
| Nam | ne: | | | | |
| Ider | ntify messages to send to | Exclaimer Cloud | | | |
| *Ap | ply this rule if | | | | |
| Th | e sender is located | | ✓ Inside the optimized in the optimi | organization | |
| | add condition | | | × | |
| *Do | the following | specify words or phra | ses | | |
| Us | e the following connect | / - | | 1 | |
| | add action | | | | |
| Exce | ept if | <> | | | |
| × Ar | message header matche | | | atur | es-MessageProcessed |
| or | | | | | |
| × Th | e sender address match | | | | |
| | add exception | | | | |
| Prop | perties of this rule: | | | | |
| \checkmark | Audit this rule with sev | | OK Cano | el | |
| No | ot specified 🔻 | | | | |
| Cho | ose a mode for this rule: | | | | |
| ۲ | Enforce | | | | |
| 0. | Test with Policy Tips | | | | |
| 0. | Test without Policy Tips | | | | |
| | | | | Save | Cancel |

p) Now click the 'add exception' button a third time and from the second 'or...' dropdown, select 'The message properties...' and then 'include the message type':

| new rule | |
|--|---|
| Name: | |
| Identify messages to send to Exclaimer Cloud | |
| *Apply this rule if | |
| The sender is located | - Inside the organization |
| The sender is located | |
| add condition | |
| | |
| *Do the following | |
| Use the following connector | Send to Exclaimer Cloud |
| add action | |
| | |
| Except if | |
| × A message header matches | <u>'X-ExclaimerHostedSignatures-MessageProcessed'</u> |
| | header matches <u>'true'</u> |
| or | |
| X The sender address matches | ▼ (<>) |
| or | |
| × Select one | ▼ |
| Select one | |
| The sender | • |
| The recipient | • |
| The subject or body | |
| Any attachment | Include the message type |
| Any recipient | Include this classification |
| The message | don't include any classification |
| The sender and the recipient | Include an SCL greater than or equal to |
| The message properties | Include the importance level |
| A message neader | |
| | Save Cancel |

q) In the 'select message type' box that pops up ensure that 'Calendaring' is selected, then click 'OK':

| Name: | | | | |
|------------------------------------|---------------------|---|----------------|---------------------------------------|
| Identify messages to send to Excla | aimer Cloud | | | |
| *Apply this rule if | | _ | | |
| The sender is located | • | • | Inside the org | anization |
| add condition | | | | |
| | | | | |
| *Do the following | | _ | | |
| Use the following connector | | | | r Cloud |
| add action | select message type | | | |
| | 5 71 | | | |
| Except if | Calendaring | | ~ | |
| A message header matches | calendaring | | | edSignatures-MessageProcessed true |
| or | | | | |
| The sender address matches | OK | | Cancel | |
| or | | | | |
| The message type is | • | • | *Select one | |
| add exception | | | | |
| De la calcula | | | | |
| Properties of this rule: | | | | |
| Audit this rule with severity le | vel: | | | |
| | | | | |

r) Click the 'Save' button to complete creation of the rule.

NOTE: Microsoft advise that a newly created transport rule may take as long as 1 hour to become operational.

Step 5 (OPTIONAL): Limit the number of users whose messages are sent to the Exclaimer Cloud

You may want to test Exclaimer Cloud Signatures for Office 365 using a restricted number of users before rolling it out more widely. The simplest way to do this is by using a Distribution Group populated only with the users whose messages you want to send to the Exclaimer Cloud.

a) From the menu on the left of the Exchange admin center, click 'recipients' and select 'groups' from the row of options along the top. Click the '+' icon to create your group, and select 'Distribution group' from the dropdown menu:

| Exchange admin ce | enter |
|--|--|
| dashboard | mailboxes groups resources contacts shared migration |
| recipients permissions compliance management | Instead of a distribution group, consider using a new Office 365 Group to collaborate by sharing conversations, documents, and a calendar. Learn more or create an Office 365 Group. |
| organization | Distribution group A GROUP TYPE EMAIL ADDRESS |
| protection | Dynamic distribution group no items to show in this view. |
| mail flow | |
| mobile | |
| public folders | |
| unified messaging | |

b) The Group creator will appear. Give your group a descriptive name and an alias of your choice. The email address field will default to the same as the alias but you can change it. Add in the members whose messages you want to send to the Exclaimer Cloud, then change any of the other options if required. Click **'Save'** to complete the creation of the Group:

| new distribution of | group | |
|--|-----------------------|-----------|
| *Display name: | | |
| Exclaimer Cloud Signature | es Group | |
| *Alias: | | |
| signatures | | |
| *Email address: | evclaimer onmicro | osoft c 💙 |
| Notes: | exclaimenonmicro | Joint + |
| Users whose messages wi Exclaimer Cloud | ll have signatures ad | ded by |
| | Save | Cancel |

c) From the menu on the left of the Exchange admin center, click 'mail flow' and select 'rules' from the row of options along the top. Highlight the rule that you created in Step 4, then click the 'edit' icon:



| +• 🖍 🗈 | | | |
|--------|--|------------|---|
| ON | RULE | PRIORITY A | |
| M | Identify messages to send to Exclaimer Cloud | 0 | Identify messages to send to Exclaimer Cloud |

d) The Rule editor will appear. Click the 'add condition' button:

| Name: | | |
|---|---|---------------------------------------|
| dentify messages to send to Exclaimer Cloud | × | |
| *Apply this rule if | | |
| The sender is located | - | Inside the organization |
| add condition | | |
| 'Do the following | | |
| Use the following connector | • | Send to Exclaimer Cloud |
| add action | | |
| Except if | | |
| The sender address matches | • | <u>'</u> \ |
| or | | |
| The message type is | • | Calendaring |
| Dr | | X-ExclaimerHostedSignatures- |
| A message header matches | • | MessageProcessed' header matches 'tru |
| | | |

e) A new dropdown field will appear just above the 'add condition' button. Click in this field and select 'The sender...' and then 'is a member of this group':

| ame: | |
|---|--|
| dentify messages to send to Exclaimer Cloud | |
| Apply this rule if | |
| The sender is located | Inside the organization |
| nd | |
| Select one | ~ |
| Select one | |
| The sender | is this person |
| The recipient | is external/internal |
| The subject or body | is a member of this group |
| Any attachment | address includes any of these words |
| Any recipient | address matches any of these text patterns |
| The message | is on a recipient's supervision list |
| The sender and the recipient | has specific properties including any of these words |
| The message properties | has specific properties matching these text patterns |
| A message header | has overridden the Policy Tip |
| The mersage time is | IP address is in any of these ranges or exactly matches |
| The message type is | domain is |
| r | W Eveloise addacts d Cignatures Massa a Descared |
| A message header matches | header matches 'true' |
| | |

f) The Group selector will appear. Highlight the Group that you created in point b) above, then click the '**add ->**' button:

| ₽ ₿ | | |
|--|--|---|
| DISPLAY NAME | * | EMAIL ADDRESS |
| Exclaimer Cloud Signatures | Group | signatures@exclaimer.onmicrosoft.com |
| My Office 365 Administrator | | admin@exclaimer.onmicrosoft.com |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | 1 se | lected of 2 total |
| elect a user from the list and | 1 se click Add. | lected of 2 total To add recipients who aren't on the list, type |
| elect a user from the list and heir email addresses and click | 1 se click Add. : Check na | elected of 2 total To add recipients who aren't on the list, type mes. |
| elect a user from the list and heir email addresses and click add -> | 1 se click Add. : Check na Exclaime | ected of 2 total To add recipients who aren't on the list, type mes. r Cloud Signatures Group[remove]; |

| OK | Cancel | |
|----|--------|--|
| | | |

g) Confirm that your changes have taken effect, then click the 'Save' button to complete the modifications to the rule:

| Name: | - |
|--|--|
| Identify messages to send to Exclaimer Cloud | |
| *Apply this rule if | |
| The sender is located | ✓ Inside the organization |
| and | |
| The sender is a member of | <u>'Exclaimer Cloud Signatures Group'</u> |
| add condition | |
| *Do the following | |
| Use the following connector | Send to Exclaimer Cloud |
| add action | |
| Except if | |
| The sender address matches | ▼ (<>) |
| or | |
| The message type is | <u>Calendaring</u> |
| or | |
| A message header matches | <u>'X-ExclaimerHostedSignatures-MessageProcesse</u> header matches <u>'true'</u> |
| | |

NOTE: Microsoft advise that changes to a transport rule may take as long as 1 hour to become operational.