

Google Onboarding

Information in advance of your assisted setup of Exclaimer

Introduction

Thank you for booking remote assistance. We're looking forward to helping you get started with your Exclaimer subscription.

This document shares helpful information and things you can prepare ahead of time. Read this document carefully to make sure that your onboarding session runs smoothly and is completed successfully.

Ahead of our remote session, if you need anything further, including cancelling or rescheduling the appointment, please contact your Exclaimer Sales representative.

Preparation

System requirements

Google Workspace Plans
• Business Starter • Business Standard • Business Plus • Enterprise

Starting your subscription

We suggest that you create your Exclaimer subscription ahead of your onboarding session.

You can sign up at https://portal.exclaimer.com/sign-up/ and choose to sign-up with either your corporate Google account or your work email. The account you use for sign-up will become the owner of the subscription, but you can change this at any time by requesting it from your sales representative.

You'll be asked to fill in some personal information, select the email service you use, and select the number of licenses that you'll need to cover all your mailboxes.

Granting access to further users

Once you've created your subscription, you can provide access to the Exclaimer portal to additional users within your organization.

When you add another user, they'll get an invitation to create a password. Alternatively, you can direct them to sign in using their corporate Google account.

Read more about adding additional users here.

Designing your first email signature

Once you've created your subscription, you can start designing your signatures straight away. Creating signatures ahead of time means you can deploy them as soon as configuration is complete.

We offer professional services to help you create signature templates, including converting any existing signatures into an Exclaimer design. If you're interested, speak to your sales representative.

***Note**: You can't deploy or preview any signatures with users' details until after configuration has been completed.*

Existing Exclaimer Signature Manager templates

If you currently use an on-premises signature solution provided by Exclaimer, signature templates can't be migrated. You can, however, recreate these signature designs using the drag and drop editor.

We also have a professional service to recreate any existing signature templates for you. If you're interested in this service, please speak to your sales representative.

All existing signature policies will also need to be recreated. We advise you to perform a full review of these policies, making note of how all signatures are configured.

Determine deployment configuration.

Another decision we recommend you make ahead of onboarding is how you want Exclaimer to be configured. There are two types of configurations available to you:

- Server-Side
  This involves integrating your Google Workspace mail flow to apply signatures to all devices after emails have been sent.

- Client-Side
  In this method we use a Google Workspace application that makes email signatures available for application during email composition within the online Gmail client.

You should already know which of these integrations you want to configure ahead of the setup and have the relevant permission to integrate in the ways required. You can also read more each deployment method here.

Updating your SPF record

If you plan to use our server-side method to deploy signatures, we strongly advise you update your SPF record within your DNS settings.

This prevents any messages imprinted with a signature by Exclaimer from being flagged as spam when sent to the recipient.

Read more about updating your SPF record here.

Configuring third-party gateways

If you plan to use our server-side deployment and use a third-party gateway for your outgoing mail, like Mimecast, Proofpoint or Barracuda, we may need to reconfigure the connections that enable these services during the session to ensure Exclaimer will work. Please be prepared to recreate the settings for the solutions within your Gmail mail route.

On the Session

Microsoft Teams

For the remote session, we'll use Microsoft Teams to host the call. Please check you can connect to Teams calls, connect to the audio, and share your screen.

While we aim to guide you through the steps required, we may need to take control of your machine remotely to complete the setup.

Session length

The setup of Exclaimer takes on average about 30 minutes. If you want us to test the solution after configuration, plan for the session to run for the full hour.

If you're running late, please let us know as soon as you can. We'll wait for you to arrive to the session for 15 minutes but will have to reschedule after this point.

Super administrator access

During the setup process, there are some steps where authorization from a Super Administrator is needed. We'll need someone with this level of authorization for the whole session. Otherwise, we won't be able to proceed with the setup.