

Exclaimer

Microsoft 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

Microsoft 365 Plans			Exchange Servers
• Microsoft 365 Business Basic • Microsoft 365 Business Standard • Microsoft 365 Business Premium	• Microsoft 365 E3 • Microsoft 365 E5 • Microsoft 365 F3 • Microsoft 365 GCC • Microsoft 365 F3	• Office 365 A1 • Office 365 A3 • Office 365 A5 • Office 365 E1 • Office 365 E3 • Office 365 E5 • Office 365 F3	• Exchange 2013 CU21 and above • Exchange 2016 CU11 and above • Exchange 2019 CU1 and above

You must have a configured Microsoft Azure Active Directory, even when using Exclaimer with an on-premises Exchange server (works with a free Azure AD tenant).

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 Microsoft account or with 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 more users within your organization.

After you've added another user, they'll get an invitation to create a password, or you can direct them to sign in using their corporate Microsoft 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're currently using an Exclaimer on-premises signature solution, your templates can't be migrated. You can, however, recreate these designs using the drag and drop editor.

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

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

Determine deployment configuration.

We recommend deciding in advance how you want Exclaimer to be configured. There are two types of configurations available:

- Server-Side
  This involves integrating your Exchange Online and/or Local Exchange mail flow to apply signatures to all devices after emails have been sent.

- Client-Side
  In this method, we use an Outlook Add-In that makes email signatures available for application during email composition.

You can read more about 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, you'll likely need to reconfigure the connectors that enable these services.

This process is simple to complete but should be done outside of office hours as it can cause a short period of downtime.

Read more about reconfiguration of third-party services here.

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.

Global administrator access

During the setup process, there are some steps where authorization from a Global 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.

On-premises Exchange

If you're using a mail route that includes on-premises Exchange servers, we'll likely need to install an agent on each Exchange mailbox server in operation. We'll need access to these servers, and a restart of the transport service on the day of install.