Exclaimer

Set Up Your Exclaimer Account in 7 Steps

Follow this simple 7-step guide to configure your account and launch Exclaimer for Microsoft 365.

1 Configure your account

- Connect to Active Directory
- Create mail flows for a test group: Server-Side vs Client-Side Configuration
- Update SPF records

2 Design your first signature

- Contact your Marketing team or Designer for sign-off on the first signature design
- Create first signature template as a default for all users

3 Specify rules for your signature

- Select senders (for client-side users, enable the plugin in your O365 environment or download the Exclaimer Agent)
- Enable the signature (for client-side users, enable the plugin in your O365 environment or download the Exclaimer Agent)
- Add test users to a Test Group
- Run a sync

4 Test your first signature

- Send a test email to yourself or Test Group from both a mobile device and computer
- Validate the signature design and workflow are working as intended

5 Notify your organization

- Have your users remove old signatures from accounts and devices to ensure emails do not duplicate signatures

6 Update your senders list within Exclaimer

7 Remove the secondary condition from the transport rule

- This ensures everyone gets mail routed through Exclaimer

Signatures are now enabled for your organization!



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Additional Resources

Client-Side vs. Server-Side Signatures and Mail Flow
Synchronizing Azure AD to Exclaimer
Installing the Exclaimer Add-In or Agent
Signature Designer Overview
Guidelines for Branding and Formatting Signatures
Custom Attributes and Fields
Overview of Signature Rules
Testing Signatures
User Permissions and Inviting Additional Users

Team Members to Engage

Exclaimer Administrator to configure account
IT user to connect to AD and update SPF records
Marketer or designer to create or review first signature template