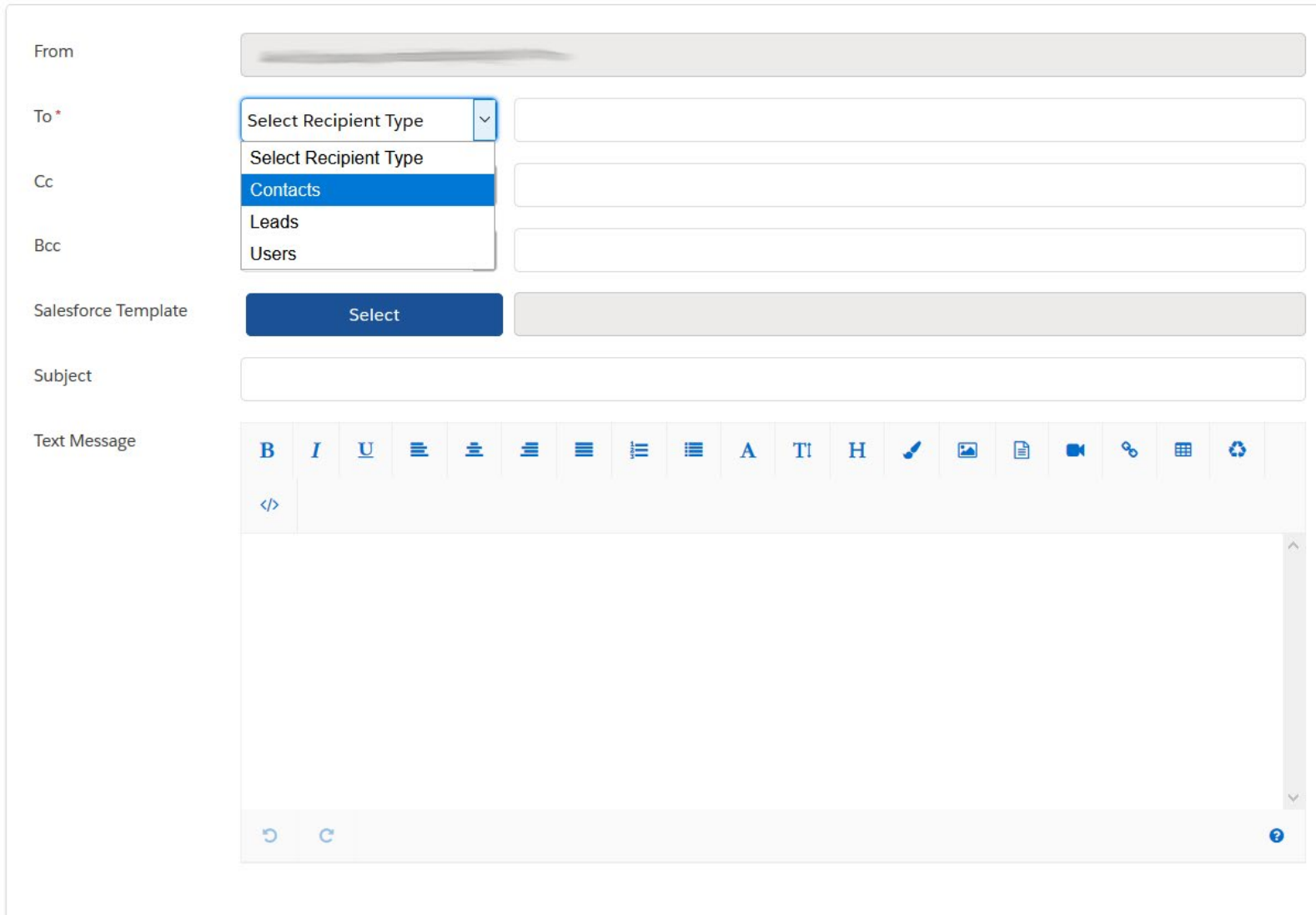




Product Overview

Easy Compose Emails Interface

A screenshot of the RMail email composition interface. On the left, there are labels for 'From', 'To *', 'Cc', 'Bcc', 'Salesforce Template', 'Subject', and 'Text Message'. The 'From' field is a greyed-out text box. The 'To', 'Cc', and 'Bcc' fields are each preceded by a dropdown menu labeled 'Select Recipient Type'. The 'To' dropdown is open, showing options: 'Contacts' (highlighted in blue), 'Leads', and 'Users'. The 'Salesforce Template' field has a blue 'Select' button. The 'Subject' field is a standard text input. The 'Text Message' section contains a rich text editor with a toolbar of icons for bold, italic, underline, bulleted list, numbered list, decrease indent, increase indent, link, unlink, text color, background color, insert image, insert document, insert video, insert link, insert calendar, and undo. Below the toolbar is a large text area for composing the email body, with a small code editor icon (</>) on the left and a vertical scrollbar on the right. At the bottom of the text area are icons for undo, redo, and a help/question mark.

RMail® for Salesforce fully integrates with your CRM allowing you to add Contacts, Leads and Users as recipients in the usual To, Cc and Bcc fields. It also features a quick search for you to use your Salesforce Email Templates.

Choose Legal Compliance and Security

Track & Prove

☒ Marked as a Registered Email Message
☐ Unmarked

☒ **Encrypt - select primary receiving experience**

☒ Transmission - auto-decrypts for receiver
☐ Message Level - decrypts with password

☐ Email Password

☐ **E-Sign - send for signature**

☐ Free - form signature and text
☐ Email Sign

☐ **File Share**

☐ **SideNote®**

☐ Cc
☐ Bcc

Send a private note only visible to the Cc and/or Bcc recipients

Register Reply

☐ Receive proof of content and time of replies to this email

Client/Reference Code

When sending emails from Leads, Contacts, Accounts, Opportunities or Cases, **RMail® for Salesforce** lets users choose the security and legal compliance options you need in every communication.

- **Track & Prove:** To have proof and know when emails have been delivered and opened by the recipients.
- **Encrypt:** Add security to your communications by encrypting your emails during Transmission or requesting a password input to be opened.
- **E-Sign:** Your recipients can sign documents using any desktop or mobile web browser in an intuitive, guided signing process.
- **SideNote®:** 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.

Easy Tracking

RMail Status -> NDA			
Related		Details	
RMail Status ID	-> NDA	Owner	
Tracking Number	3EA25F0ABD1B42065FB77D01AF012D4F F2B1D37F	Customer Tracking ID	
Sender Name		Sender Address	@rpost.com
Subject	NDA	Overall Status	
Time Local: App Send	8/10/2020, 9:46 AM	Time UTC: Received at RMail	8/10/2020, 4:46 PM
Time Local: Received at RMail	8/10/2020, 9:46 AM		
▼ Sent From			
Account		Case	
Contact		Lead	
Opportunity			
▼ First Recipient Details			
Recipient Address	@rpost.com	Recipient Delivery Status	
Time Local: Delivered	8/10/2020, 9:46 AM	Time UTC: Delivered	8/10/2020, 4:46 PM
Time Local: Opened		Time UTC: Opened	
Recipient Delivery			

RMail® for Salesforce will store tracking records in the Salesforce database. You can define data sharing and security for all your users.

- Use List Views, Reports and Dashboards for quick overviews.
- Build any Salesforce automation based on the tracking object to meet your business needs.

Enforce Security and Legal Compliance

[Create New Rule](#)

Rule Name	Rule Description
ESign when E-Signatures	Recommends that the user selects the E-Sign option for sending RMail under the account
Contact Template Rule	Forces the user to Encrypt outgoing email templates containing sensitive information

RMail® for Salesforce enforces security by letting you create rules that suggest, pre-select or force the user to include any tracking or security features. Rules can be based on selected email templates or field criteria.

Manage the UX



General Settings

RMail Web App Language

English

RMail Service Language

English

Date Format

mm/dd/yyyy

Acknowledgement Emails

Enable

Feature & Default Settings

Track & Prove

Enable

☒ Marked as a Registered Email Message

☐ Unmarked

Encrypt - select primary receiving experience

Enable

☒ Transmission - auto-decrypts for receiver

☐ Message Level - decrypts with password

☐ Email custom password

Password

With **RMail®** for **Salesforce** you can enable / disable the options shown to your users, keeping the UX relevant and simple.

Manage Users in Salesforce

Please Select User View

All Salesforce Org Users

All Salesforce Org Users

Active RMail Users

Users Pending Approval

You don't need to access a different system to manage your users, **RMail® for Salesforce** helps you have control in one place.

Users currently not connected to RMail

	Full Name	Email	Username
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]
☐	[REDACTED]	[REDACTED]	[REDACTED]