

 **Mail**<sup>TM</sup> for Salesforce  
Cheat Sheet  
The logo features a red shield with a white 'R' inside. To the right of the shield is the word 'Mail' in a bold, dark blue, sans-serif font, followed by a small 'TM' trademark symbol. To the right of 'Mail' is the text 'for Salesforce' in a large, black, sans-serif font. Below this is the text 'Cheat Sheet' in a smaller, black, sans-serif font.

# Sidebar



## Track & Prove

- ☒ Marked as a Registered Email Message  
☐ Unmarked

## ☐ Encrypt - select primary receiving experience

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

Random password (click to change)

☐ Email Password

## ☐ E-Sign - send for signature

- ☐ Free - form signature and text  
☐ Email Sign

## ☐ File Share

## ☐ SideNote®

☐ Cc

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

☐ Bcc

## Register Reply

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

## Client/Reference Code

## Option

## Description

### Track & Prove

Provides senders with a Registered Receipt email for proof of sending, delivery, content and time

- **Marked as a Registered Email™ Message:** Adds a banner and markings to ensure the email stands out in the recipient's inbox
- **Unmarked:** Doesn't have any indication to the recipient that the sender has proof for that message.

### Encrypt

The RMail encryption service uses TLS for sending and receiving encrypted emails.

- **Transmission – auto-decrypts for receiver:** The message is decrypted at the mail server and is sent to the recipient's mailbox unencrypted with no password requirement. The message is marked with the RPost banner and is clearly identified as being “transmitted encrypted”.
- **Message Level – decrypts with password:** In order to open the message content, the recipient has to input a password automatically generated or specified by the sender. You can choose to send the password via email or not. When generated automatically, you'll get the password in your inbox

### E-Sign – send for signature

Allows the recipient to electronically sign and timestamp an email and each page of attachment(s) entirely by email

- **Free-form signature and text:** A handwritten mouse-scripted signatures is applied to documents. You can obtain recipient or multiparty signatures
- **Email Sign:** Recipient signs in agreement with two clicks of the mouse to sign and time/date stamp documents. This service allows a sender to close deal by email with high evidential weight

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# RPOST

## Option

## Description

### File Share

This feature may be combined with encryption to add privacy.

The sender simply clicks on the Add Files button to browse and upload the desired attachment(s). The recipient clicks a link in the received email directing them to a portal where they have 14-days to download and save the attachments transmitted.

### SideNote®

Provides an efficient method of sending private notes only visible to the **Cc** and/or **Bcc** recipient(s) by using a yellow 'sticky-note' box at the top of the message for their viewing only. The recipients in the "To" field do not receive the SideNote content.

### Register Reply

Messages with the "Register Reply" service activates the recipient's reply to be a Registered Email™ message without any special software or account set up required by the recipient.

This feature is selected only if a user would like to allow the reply to the email to come back to the original sender as a Registered Email™ message. The recipient does nothing more than press the 'Reply' button on their mail program. The sender receives a receipt for both the email sent and the reply email.

### Client/Reference Code

Assigns a Client/Reference or subject matter code to each Registered Email™ message sent.

The code is documented on both the Registered Receipt email in the "Message Envelope" section and in the "Client Code" column of the usage reports.

# Compose

From: [Redacted] <[Redacted]@rpost.com>

To \*

Cc

Bcc

Salesforce Template

Subject

Text Message

**B** *I* U [List Icons] [Text Color A] [Text Color TI] [Text Color H] [Text Color] [Image] [Document] [Video] [Link] [Table] [Refresh]

</>

[Reply] [Reply All] [Help]

Composing an email is as simple as in any other email service but with perks.

In order to fully integrate with your Salesforce CRM system, RMail® will let you choose Leads, Contacts and Users to include in your To, Cc and Bcc fields.

You can also save time by using any Salesforce email template available instead of writing the email.

Attachments can be added from your computer, the related attachments in the record where you clicked the button or email templates, making it easy and accessible to share important documents to send to users