

Top Tip

Adding disclaimers to email messages

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▶ The Problem

“How can I add disclaimers to all the email messages my organization sends? Is there any other way I can add disclaimers? What if I want to add a different disclaimer to email messages coming from a particular department?”

▶ The Solution

Setting up disclaimers

Disclaimers using the default rules

The easiest way to add a disclaimer to your email messages is to use the default rules. These are set up to provide a convenient way of adding disclaimers to incoming, internal and outgoing email. To add a disclaimer you simply place a tick in the relevant checkbox that corresponds to the type of email you want to add a disclaimer to. For example, to add a disclaimer to outgoing mail you select the **Disclaim outgoing mail** checkbox.

If you haven't created a disclaimer before Exclaimer Mail Utilities will add its default disclaimer. However, you can produce your own disclaimer or select from a list of disclaimer templates that already have the text filled out for you. These templates can be edited so you could base your own custom disclaimer on one of them.

Disclaimers using custom rules

You can also add disclaimers to email messages using custom rules which allow you to be far more specific about exactly what messages the disclaimer is added to. For example, rather than just incoming, internal and outgoing mail you can make sure that your custom rule disclaimer is only added to email messages that are sent to a specific domain or that email messages sent from a particular department have a different disclaimer. This not only gives you more control over which disclaimers go on what email message but also will allow for more flexibility especially when dealing with compliance regulation on an international scale.

Custom rules even enable you to create complex criteria for adding disclaimers that you cannot get from default rules alone.

Before you setup the rules

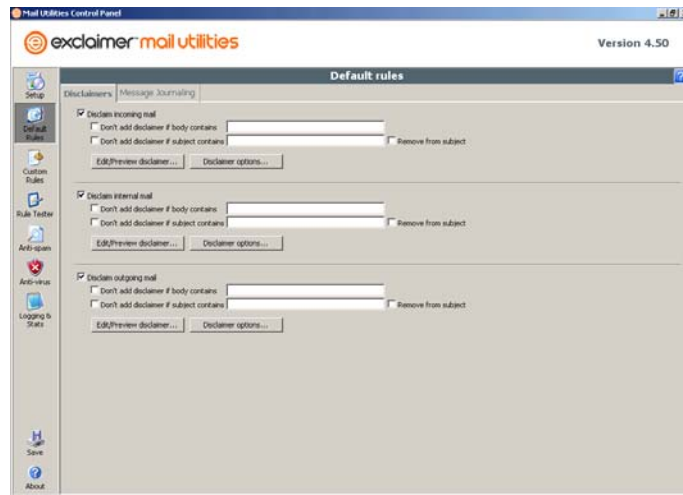
1. Install **Exclaimer Mail Utilities 4.50** or later.

You can download the latest release version from our website at <http://www.exclaimer.com/download>

► Using Default Rules to add disclaimers

Using the default rules to add disclaimers to your organization's email will use Exclaimer Mail Utilities' default disclaimer text that changes depending on whether the email messages are incoming, internal or outgoing.

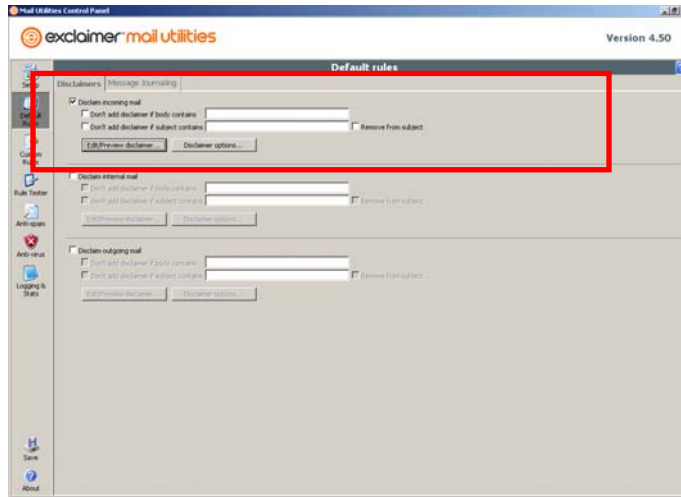
Please note – The following steps are based on a new Exclaimer Mail Utilities installation with disclaimers enabled and no Custom rules setup.



Adding a disclaimer to all incoming email using the default rules

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Default Rules** icon in the left-hand menu.
3. Click on the **Disclaimers** tab.

4. Select the **Disclaim incoming mail** checkbox.



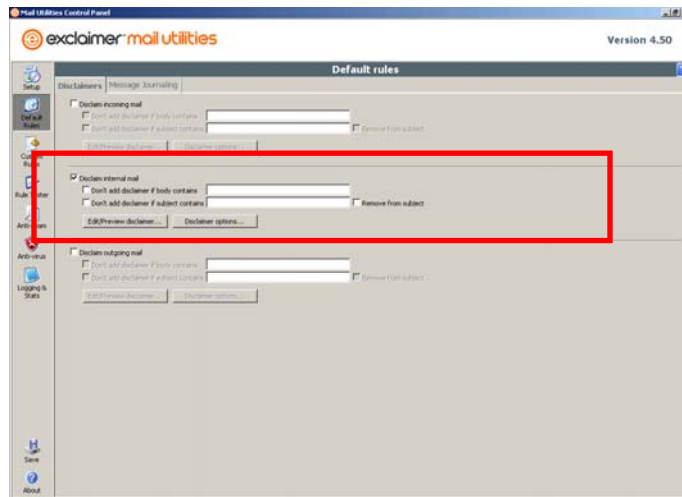
5. Click on the **Save** icon at the bottom of the left-hand menu.

Note - The default disclaimer text for incoming email messages is 'This message was received from outside of the company.'

Adding a disclaimer to all internal email using the default rules

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Default Rules** icon in the left-hand menu.
3. Click on the **Disclaimers** tab.

4. Select the **Disclaim internal mail** checkbox.

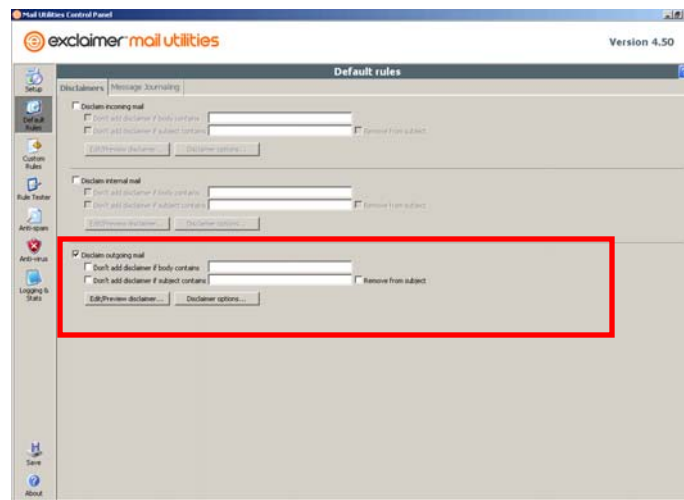


5. Click on the **Save** icon at the bottom of the left-hand menu.

Note - The default disclaimer text for internal email messages is 'This message was received from inside the company.'

Adding a disclaimer to all outgoing email using the default rules

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Default Rules** icon in the left-hand menu.
3. Click on the **Disclaimers** tab.
4. Select the **Disclaim outgoing mail** checkbox.



5. Click on the **Save** icon at the bottom of the left-hand menu.

Note - The default disclaimer text for outgoing email messages is 'This message (and any associated files) is intended only for the use of the individual or entity to which it is addressed and may contain information that is confidential, subject to copyright or constitutes a trade secret. If you are not the intended recipient you are hereby notified that any dissemination, copying or distribution of this message, or files associated with this message, is strictly prohibited. If you have received this message in error, please notify us immediately by replying to the message and deleting it from your computer. Messages sent to and from us may be monitored.'

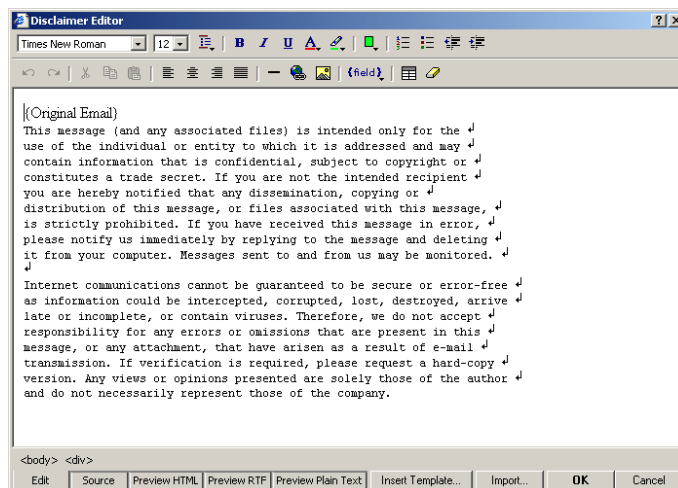
Internet communications cannot be guaranteed to be secure or error-free as information could be intercepted, corrupted, lost, destroyed, arrive late or incomplete, or contain viruses. Therefore, we do not accept responsibility for any errors or omissions that are present in this message, or any attachment, that have arisen as a result of e-mail transmission. If verification is required, please request a hard-copy version. Any views or opinions

presented are solely those of the author and do not necessarily represent those of the company.'

Editing a disclaimer

You can edit the default disclaimer using Exclaimer Mail Utilities' Disclaimer Editor. This allows you to customize the text so that it conforms to your organization's regulation compliance policy.

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Default Rules** icon in the left-hand menu.
3. Click on the **Disclaimers** tab.
4. Click on the **Edit/Preview disclaimer...** button in the section that corresponds to the disclaimer that you want to edit.
5. Edit the disclaimer using Exclaimer Mail Utilities' **Disclaimer Editor**.



6. Click on **OK**.
7. Click on the **Save** icon at the bottom of the left-hand menu.

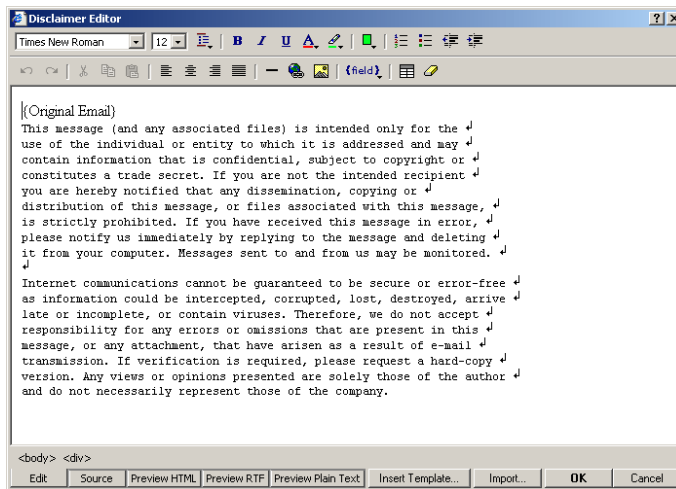
Selecting a disclaimer from the list of templates

This list contains a selection of disclaimers that conform to some of the various types of international compliance regulation. For example, there are disclaimers that meet Circular 230 requirements and ones that conform to EU legislation regarding the disclosure of company registration information in email messages.

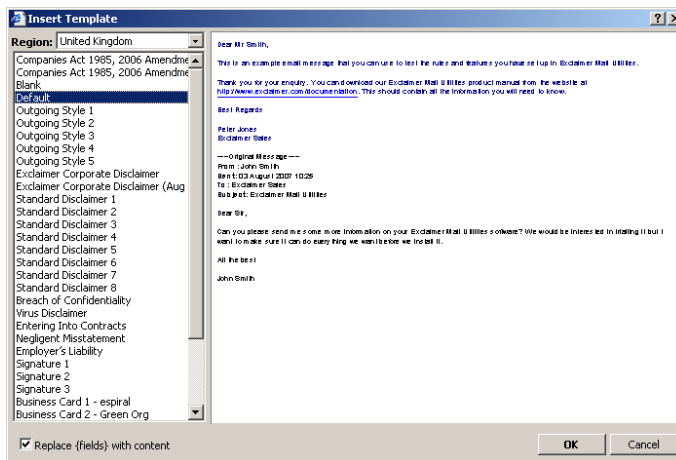
1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Default Rules** icon in the left-hand menu.
3. Click on the **Disclaimers** tab.

Click on the **Edit/Preview disclaimer...** button in the section that corresponds to the disclaimer that you want to edit.

4. Click on the **Insert Template...** button.



5. Select the disclaimer template that you want to use and click on **OK**.



6. If required you can edit a disclaimer template in the Exclaimer Mail Utilities' **Disclaimer Editor**.
7. When you have finished editing the disclaimer template click on **OK**.
8. Click on **OK**.

9. Click on the **Save** icon at the bottom of the left-hand menu.

▶ Using Custom Rules to add disclaimers

Custom rules allow you to specify a more complex set of criteria for applying the disclaimer. This means that you can apply different types of disclaimer to different types of email message - not just incoming, internal and outgoing. The additional flexibility that this provides means that you can cater for the precise needs of your compliance requirements or corporate disclaiming policy.

One of the most common requests is asking how to test whether an email is disclaimed using a specific user's mailbox only. Obviously, some clients don't want to start adding disclaimers to email messages before they are ready.

Adding a disclaimer to an email from a specific user to another specific user using a custom rule

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Custom Rules** icon in the left-hand menu.
3. Click on the **Add Rule...** button.
4. Type the name of your disclaimer custom rule in the **Rule name:** field.

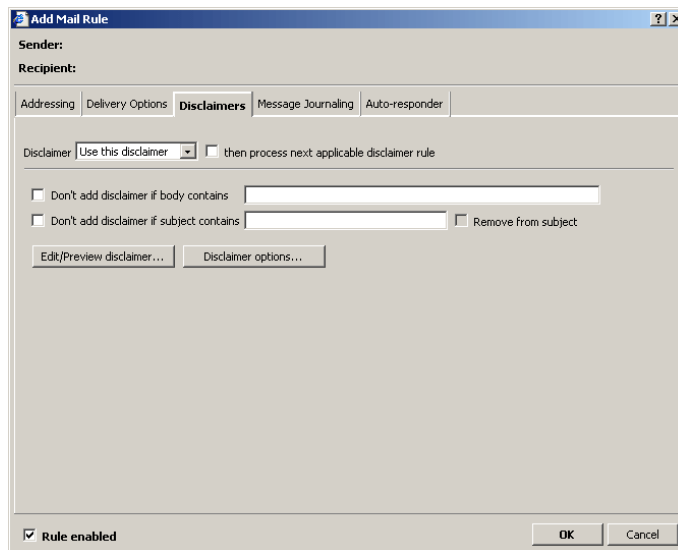
The screenshot shows the 'Add Mail Rule' dialog box. It has a title bar with a question mark and close button. Below the title bar are fields for 'Sender:' and 'Recipient:'. The main area has five tabs: 'Addressing', 'Delivery Options', 'Disclaimers', 'Message Journaling', and 'Auto-responder'. The 'Addressing' tab is selected. It contains two columns: 'Sender' and 'Recipient'. Each column has radio buttons for 'is' and 'is not'. Below these are lists of criteria with radio buttons. At the bottom of each list is a 'Browse...' button. Below the lists is a 'Rule name:' text field. At the very bottom, there is a checked checkbox for 'Rule enabled', and 'OK' and 'Cancel' buttons.

You can select to add this disclaimer to many different types of email message. For example, you can choose to only add this disclaimer if the sender is in a particular AD Group or if the email message is being sent to a particular domain.

This disclaimer is added to email messages that are sent from a specific user to another specific user. This means that this disclaimer will be added only to email messages that are sent from the email address you specify to another email address you specify.

5. Select the **Active Directory Users and Groups** radio button in the **Sender** section then click on the **Browse** button. Type in the name of the sender whose messages you want to add the disclaimer to in the text box at the bottom of the **Sender** section, then click on the **Check Names** button to resolve the user account. Click on **OK** in the **Select User, Contact, or Group** box.
6. Select the **Email address** radio button in the **Recipient** section. Type in the recipient email address whose messages you want to add the disclaimer to in the text box at the bottom of the **Recipient** section.
7. Click on the **Disclaimers** tab.

Select **Use this disclaimer** from the **Disclaimer** drop down box.

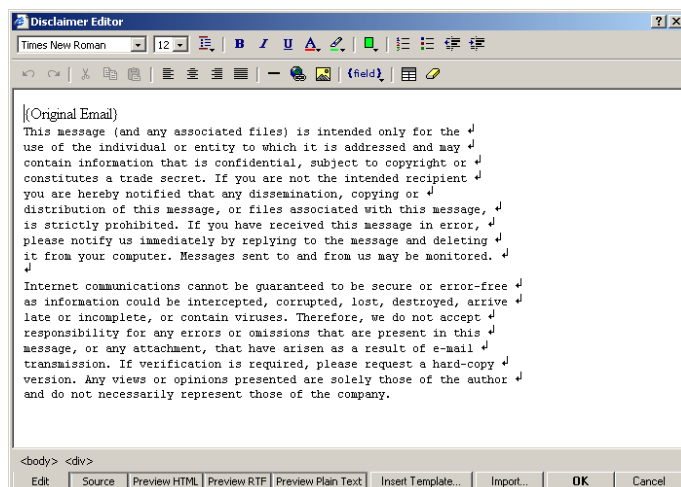


8. Clicking on the **Edit/Preview Disclaimer** button opens the **Disclaimer Editor** where you can create your own disclaimer or select one from a list of pre-designed templates. See *Editing a disclaimer in a custom rule* or *Selecting a disclaimer from the list of templates*.

9. Click on **OK** in the **Add Mail Rule** dialog box.
10. Click on the **Save** icon at the bottom of the left-hand menu.

Editing a disclaimer in a custom rule

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Custom Rules** icon in the left-hand menu.
3. Select the custom rule that contains the disclaimer that you want to edit.
4. Click on the **Edit...** button.
5. Click on the **Disclaimer** tab in the **Add New Rule** dialog box.
6. Click on the **Edit/Preview disclaimer...** button.
7. Edit the disclaimer using Exclaimer Mail Utilities' **Disclaimer Editor**.



8. Click on **OK**.
9. Click on **OK** in the **Add Mail Rule** dialog box.
10. Click on the **Save** icon at the bottom of the left-hand menu.

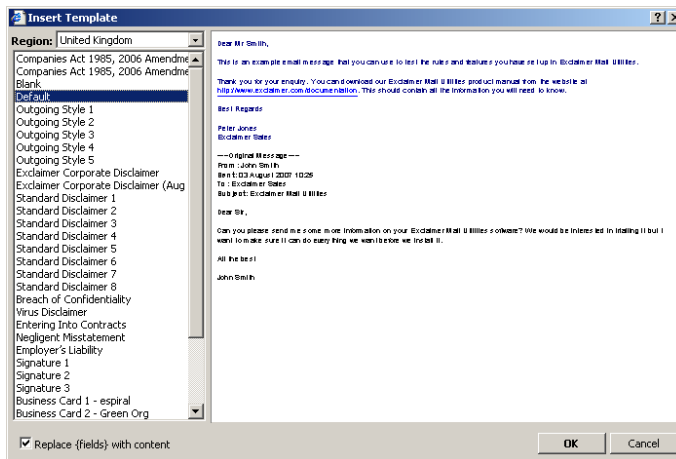
Selecting a disclaimer from the list of templates

1. Open Exclaimer Mail Utilities' **Control Panel**.
2. Click on the **Custom Rules** icon in the left-hand menu.

3. Select the custom rule that contains the disclaimer that you want to edit.
4. Click on the **Edit...** button.
5. Click on the **Disclaimer** tab in the **Add New Rule** dialog box.

Click on the **Edit/Preview disclaimer...** button.

6. Click on the **Insert Template...** button.
7. Select the disclaimer template that you want to use and click on **OK**.



8. If required, you can edit the disclaimer text in the **Disclaimer Editor**.
9. When you have finished editing the disclaimer, click on **OK**.
10. Click on **OK**.
11. Click on **OK**.
12. Click on the **Save** icon at the bottom of the left-hand menu.

For more information go to <http://www.exclaimer.com> or contact:

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