



Securing Email and Digitizing Workflows with E-Signatures

RMail® specializes in security. cleanDocs adds more data leak protections.

Easy and affordable security and compliance. Customers worldwide for more than a decade have chosen RMail® and cleanDocs for these award-winning features:

- o Email Encryption Simplified for Privacy Compliance
- o Registered Email™ Track and Prove
- o E-Sign, File Sharing, Security Gateway, DLP/Filter, Wire Fraud Protection
- o Recipient address verification & advanced metadata cleaning by cleanDocs
- o Runs Inside Office 365 Outlook

WHAT'S NEW

cleanDocs adds RMail

- Integration that simplifies and automates email security, e-delivery proof, e-signatures, and privacy compliance.
- Combines the best of each into one Office 365 Microsoft Outlook interface.

WHY GREAT?

More Enjoyable Productivity:

- brings the main RMail service features – **Registered Email™ certified e-delivery proof**, dynamically simplified **email encryption**, and **e-signatures** -- right into their comfortable cleanDocs Outlook email interface alongside the cleanDocs data leak protection tools.
- Encryption must be easy, especially for the recipient, to encourage use and reduce risk. Not all encryption services are the same; too burdensome means little used, more risk.
- This is critical with today's more sophisticated privacy regulations, client demands for privacy, and hacker tactics.

FAQ: Why RMail Encryption vs. Others?

Dynamically simplifies sender and receiver experience.

*Customers with a Microsoft email offering (e.g. Office 365 E3, E5) choose RMail for its email encryption because of the elegant user experience, **especially for the recipient**, and for the Registered Receipt™ proof of privacy compliance, e-delivery proof, and tracking record.*

*Other encryption services like Microsoft encryption require the recipient to click links, register, and log-in to retrieve the encrypted email. This causes a high un-opened rate as receivers get frustrated. **RMail encryption is elegant for the recipient as RMail always delivers direct to the recipient inbox without any recipient registration or download requirements.***

FAQ: Why RMail Registered Email Tracking vs Outlook Read Receipt Tracking?

Registered Email™ certified e-delivery services track delivery and message opening regardless of recipient or system settings and provides an audit trail forensic record that can authenticate content and uniform timestamps.

- *By contrast, Outlook and other simple read receipts only work if the recipient has Outlook and has the right settings on, and even if it returns a read receipt, the receipt (a) tells nothing about message content, (b) times are based on the senders computer and are not uniform, and (c) format is simple text such that it can be modified and is not an authenticatable.*

FAQ: Why RMail E-Signatures vs Others?

RMail e-sign simplifies sending for recipient e-signature without requiring any document preparation; or use RSign full service for more advanced services.

- *Provides a simple option to send any document for signoff without the need to set up or prepare document fields; this reduces send time and makes e-sign an “attach-to-email-and-send” process.*
- *One click away is RSign Advanced functions for creating more controls around the signing process or using drag-and-drop functionality to set up e-sign templates with rules.*
- *RMail e-signatures are less than half the cost of other full-service e-sign providers, with all the features needed.*

Automated Security:

- For security and compliance staff, this combination adds more to their data leak prevention and anti-phishing strategies with
 - o powerfully dynamic recipient address checking -- *cleanDocs*
 - o advanced metadata cleaning and attachment handling -- *cleanDocs*
 - o specialized Anti-Whaling impostor email “spearphishing” protection – *RMail*
- Minimizes risk of potentially embarrassing or harmful human error.

FAQ: Why *cleanDocs* Metadata Cleaning vs Others?

Saves time for senders, adds automation and advanced options.

Customers with a Microsoft Office can clean metadata one document at a time inside Word and other programs, but it adds extra steps and the process is specific to each program/file type and must be done for each attachment one at a time.

- o *cleanDocs lets you clean the metadata for all attachments and types with one click when sending attachments, adjust attachment file names without having to save, and is lightning-fast (unlike other third-party metadata cleaners which can be slow).*

Simplified IT Experience:

- For IT departments, this combination
 - o minimizes desktop add-in complexity,
 - o creates easier connections to document management systems,
 - o simplifies the recipient email encryption experience which minimizes calls for help to IT support staff, and
 - o arms end users with e-delivery tracking and proof visibility – no need to ask IT what happened to their important email, and

FAQ: Why *RMail* Registered Email Tracking vs Server Logs?

Registered Email™ receipt is a self-contained record that can authenticate delivery, content and time in an easily portable format --- simplifies the time need by IT staff and experts to process an email investigation and proving delivery of disputed email.

So easy, simply forward the Registered Receipt to the other party and they then have all the data to authenticate if needed. By contrast, piecing together and packaging server logs with the record of the original sent item is challenging to do possibly months or years after the sent date, when evidence may be needed, and may be impossible to gather/authenticate.

HOW DO I GET STARTED?

Step 1. Getting Started.

1. Install cleanDocs (Pro or Standard) version 2.7 or later.
 - a. You will need a cleanDocs software key
 - b. You may need to enable the RMAIL function in the options pane or with enterprise options setting processes.
2. Install RMail for Outlook Desktop and Office 365
 - a. RMail has a special install package for cleanDocs, preconfigured. Look for version number with a “D” in the version number, “D” for DocsCorp.
 - b. A base RMail service license is included with cleanDocs – you do not need anything further to get started, for use of up to 5 messages per user per month, auto-renewing each month. For business plans or advanced settings, contact your RMail partner or RPost ([click here](#)).

Step 2. First Use.

1. Once cleanDocs is installed, you will click the normal Outlook Send button. You will see this interface if the recipient addresses are not part of the existing reply string.
2. You should confirm the recipient addresses if they are the intended recipient destinations and then, based on your need, select one of the RMail tracking, proof, encryption, or e-signature options.

TIP: You will see the RMail options even if you did not previously install the RMail add-in. In this case, you will not be able to send any messages with the RMail functions but you can click the “Learn More” to short-cut to the RMail installation or to purchase an RMail business service plan; and you can click the Advanced link to short-cut to the RSign advanced e-signature service with an included base use plan.

The screenshot shows the cleanDocs RMail interface. At the top, it says "Confirm warnings and recipients". Below this, there is a table with columns for "Confirm all", "Email", and "Risk Factors". The table contains one row with a red square icon, a checkbox, the email address "cleanDocsDemo@gmail.com (cleanDocsDemo-Contact-Gmail)", and the risk factor "Public email provider". Below the table, there is a section titled "Track, Prove, Sign, Encrypt via RPost". This section has four main options: "Track & Prove" (with a radio button), "E-Sign - Send for signature" (with a radio button and an "Advanced" link), "Encrypt - Select primary experience" (with a radio button), and "RMail" (with a logo and a "Learn More" link). The "Encrypt" section has two sub-options: "Transmission - auto-decrypts for receiver" and "Message level - decrypts with password". The "Message level" option has a text box for a "Random password (click to change)" and a checkbox for "Email password". At the bottom of the interface, there are four buttons: "Process and Send", "Analyze", "Save Report", and "Cancel".

Step 3. General Use.

1. If you send an email with attachments, you will see the recipient address verification and metadata cleaning options.

TIP: Only two sections will be visible at a time. Once you verify recipient addresses, the recipient verification section will collapse and the RMail options may be expanded. This is to ensure the options menu fits in the computer screen.

Initial View

The screenshot shows the cleanDocs application window. At the top left is the cleanDocs logo. Below it, there's a section for email verification with a "Confirm all" link and an "Email" header. A table shows a recipient: "cleanDocsDemo@gmail.com (cleanDocsDemo-Contact-Gmail)" with a "Public email provider" risk factor. Below this is a section for selecting metadata policy and actions, with a dropdown menu set to "Collaborate" and an "Output Options" link. A description states: "To be used internally and for trusted communications with collaborators. Will alert you if Track Changes and Comments are found and let you decide on each document." Below this is a table for file actions:

Filename	Clean	Clean & PDF	Skip
Shape.pdf	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

At the bottom, there's a section for "Track, Prove, Sign, Encrypt via RPost" and a footer with a gear icon and buttons for "Process and Send", "Analyze", "Save Report", and "Cancel".

View After Recipient Addresses have been Verified: Attachments cleaning and RMail options

The screenshot shows the cleanDocs interface with the following elements:

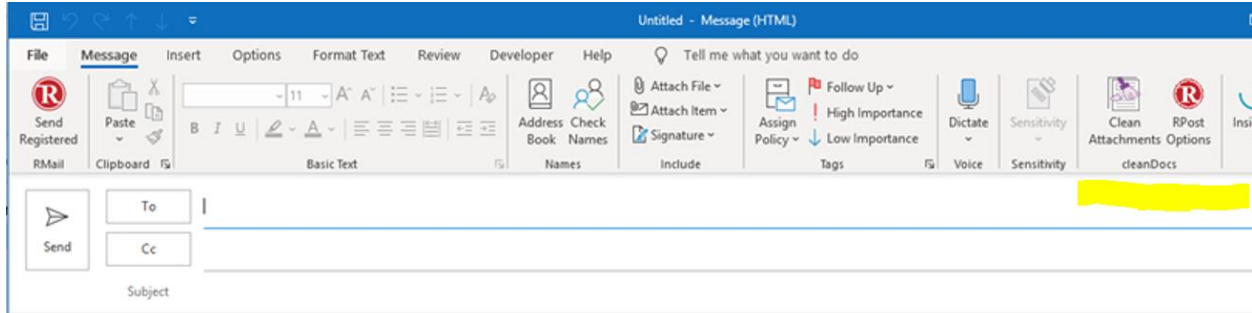
- cleanDocs** logo and window title bar.
- Select metadata policy and actions** section:
 - Policy: Collaborate (dropdown menu)
 - Output Options link
 - Description: To be used internally and for trusted communications with collaborators. Will alert you if Track Changes and Comments are found and let you decide on each document.
 - Table with columns: Filename, Clean, Clean & PDF, Skip.
 - Row 1: Shape.pdf, Clean (selected), Clean & PDF, Skip.
- Track, Prove, Sign, Encrypt via RPost** section:
 - Track & Prove: Marked as a Registered Email™ message (selected), Unmarked.
 - E-Sign - Send for signature (selected), Advanced link.
 - Encrypt - Select primary experience:
 - Transmission - auto-decrypts for receiver (selected)
 - Message level - decrypts with password
 - Random password (click to change) (input field)
 - Email password (checkbox)
 - RMail logo and Learn More link.
- Bottom bar with buttons: Process and Send, Analyze, Save Report, Cancel.

Step 4. Proactively Sending RMail (Track, Prove, E-Sign, Encrypt)

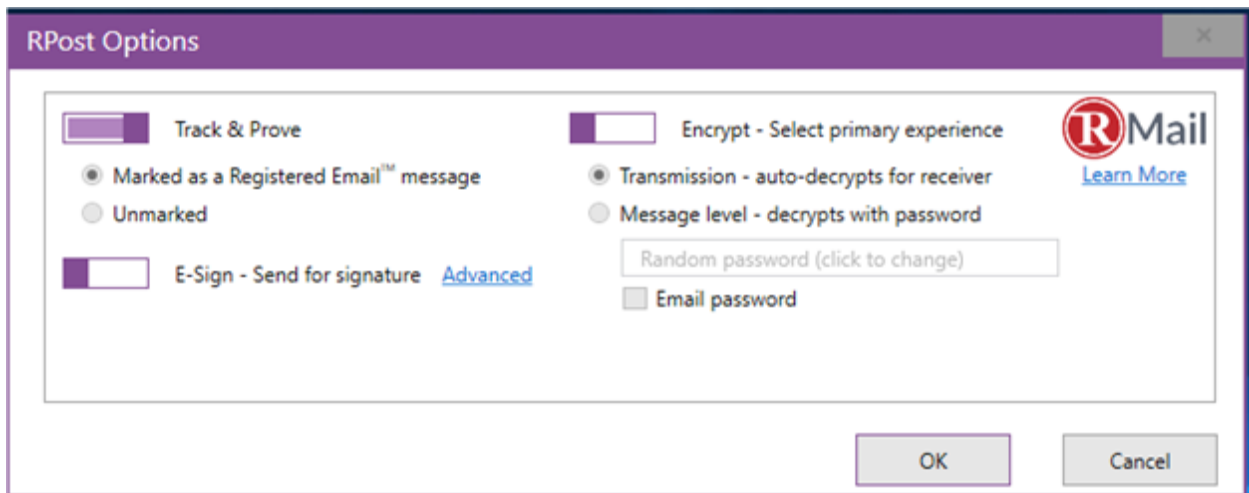
1. At times, one may be replying to an email so the recipient verification may not appear (as addresses not prompted to verify) and there is no attachment, so metadata cleaning is not prompted. In this instance, the default behavior is such that the cleanDocs (and thus RMail) options do not pop up. When the sender clicks SEND, the message is simply sent via standard email.
2. If the user wants to ensure that that important email is sent encrypted as a Registered Email™ message with tracking and proof of delivery and/or for recipient e-signature, the sender can proactively click the red circle R “Send Registered” button which will prompt the standard RMail user interface (which displays additional features including secure file sharing), or if this is not visible due to company preferences, the user can click the red circle R “RMail Options” button in the options ribbon.

TIP: A company administrator may also choose to set cleanDocs to always display the send options menu whenever an email is sent, to ensure the encryption options are always present for each message sent.

Options Ribbon



The red circle RMail Options button pops up this RMail send menu dialog.



Step 5. RMail and RSign Service Plans.

1. **RMail:** Individual users can opt for different service plans, the most popular being RMail Standard, Business, and Enterprise plans. These and other plans provide a variety of low-use, low-cost options, power use options, volume options, and APIs and Salesforce app sending options. Remember:
 - a. All users can use the service with a base use (5 messages per user per month) without any subscription or cost that is additional to their cleanDocs costs.
 - b. No RMail registration or log-in is needed for service features included in cleanDocs.
 - c. A customer administrator can ask for access to RPortal to manage users, service plan levels, and advanced settings.

Tip: A large enterprise (or any business) that authenticates sending IP addresses with RMail services can have any new user auto-enabled for a specific business or enterprise service plan; and the administrator can manage users and settings in the web based RPortal.

2. **E-Signatures:** E-signature services (called RSign Lite) are included in the RMail interface. Five RSign Lite e-signature transactions are also included in the cleanDocs offering each month with no additional cost (note, this is collectively five of any RMail messages). Additionally, three RSign Advanced e-signature transactions are included in the cleanDocs offering each month with no additional cost (in addition to the five RSign Lite / RMail messages per month). These services have been in the market since the early 2000's and have been used worldwide for more than a decade.

- a. **When to use RSign Lite (sending from the RMail interface):** RSign Lite is included in all RMail service plans. It is the easiest e-signature service to use when you do not want to take the time to configure a document or agreement as a template for signoff. There is no set-up, drag-and-drop or other work. It is truly and attach-and-send-for-recipient-signoff process. There is nothing else as easy for the sender.

***TIP:** A sender can create some controlled signing fields if they learn about some of the advanced settings. From a recipient perspective, by default, they can simply put their mouse in their browser and write or type their signature on the signature line (and fill other fields). The user experience is not as controlled as with RSign advanced services, and the mobile experience is not as guided as with RSign advanced services.*

- b. **When to use RSign Advanced:** RSign Advanced (or simply, RSign) is an enterprise-grade, full-featured e-signature service at an affordable cost. It includes every imaginable workflow setting. RSign is generally half the cost of other full-service providers. RSign includes highly configurable user interfaces, sharable templates, template rules and dependencies, sequential signing, custom workflows, real time reporting, advanced document configuration, advanced security and authentication, APIs, an elegant recipient signing interface, and much more. RSign also has an elegant recipient signing interface and provides all the functionality that you will need at a lower cost and with a friendlier service experience.

***TIP:** Higher volume business users of RSign Advanced require an additional -- and very affordable -- service plan, in addition to the cleanDocs and RMail service plans.*

- c. **RSign is committed to innovating for its customers evolving needs:** There are only two enterprise-grade e-signature pure-play companies today; RSign and one other that is more expensive and more difficult to work with. These pure plays are driving product innovation. Other global e-sign vendors have been purchased by diversified companies and as typical, once part of a larger product portfolio, innovation slows. RSign is easy to work with, the most affordable, and a full-featured innovator

WHAT ARE THE MAIN BENEFITS?

Assurance of privacy compliance with email encryption simple enough that people enjoy using it.

RMail® email encryption is so easy, especially for the recipient, that it encourages use and thereby reduces risk of data breaches or privacy enforcement actions. Not all encryption services are the same; others are too burdensome and, as a result, are little used and therefore increase risk (from non-use or circumvention of use). With today's more sophisticated privacy regulations (e.g. HIPAA, GDPR) and hacker tactics, encryption is essential. RMail makes it easy, enjoyable, automated.

Peace of mind, end-user visibility of successful delivery for important messages, with proof.

RMail® Registered Email™ services makes delivery and open tracking visible to the sender, providing assurance and peace of mind that important email was successfully delivered. This is returned in the self-authenticating Registered Receipt™ e-record, making it easy to resolve disputes – as easy as forwarding this receipt to any questioning party. The receipt is a self-contained forensic record, eliminating the need to scour server logs to try to investigate and present delivery evidence.

Cost savings with less paper, mail, postage, and administrative time.

RMail® Registered Email™ and RSign® e-signature services replace printing, postage (first class, receipt, and certified mail), scanning, faxing, administrative work and other hard costs. Businesses can send required notices with proof of content delivered and timestamped. Users can easily send agreements for recipient electronic signoff or easily e-sign documents that they receive, thus saving wasted time, cost, and other drains on your business.

Software service cost savings, reducing need for other business applications.

RMail is all-in-one. Each feature is top rated or award winning. Rather than purchase separate services for email encryption, email tracking, e-signatures, file sharing, and DLP/malware protection, with RMail, businesses can add all of these to existing email systems, at an affordable price. All RMail services combined generally cost less than purchasing just one of them from another provider; and the RMail user experience is better; elegantly integrated into Office 365 and other programs.

More security reduces risks. More security automation simplifies life for IT staff.

RMail makes security automation services easy and automated, reducing risk. RMail Gateway™ automates encryption based on message content. **RMail encryption** automatically detects the simplest, most secure method of transmission, and dynamically adjusts for the best recipient experience. **RMail Anti-Whaling™** automatically alerts staff **when email senders pose as executives**, attempting to trick staff into exposing sensitive data, or worse, paying fake invoices and sending the email impostor money.

Removing hidden data in attachments minimizes risk of accidental data exposure.

Metadata management by cleanDocs makes it easy to be sure that there is no hidden data in your email attachments that might inadvertently expose information to a recipient about who originated, authored, contributed to, or edited what attachments and when. This information may be harmless, or it may embarrass or cause other problems. cleanDocs makes it easy, unlike Office365 options that are more cumbersome and complicated to use.

Re-verification of email recipient addresses reduces risks. Send email to the right recipients.

Email is quick and easy to send. If not careful, it is also quick and easy to send to the wrong recipient, especially when relying on email address auto-complete tools. Sending sensitive information to the wrong recipient can cause data breaches and a lot of embarrassment. Predictive technology that makes it easy to re-verify recipient addresses reduces the risk of information leaks. Recipient address checking by cleanDocs makes it easy.

Law firms rely on RMail and cleanDocs combination to make more security easier to use for lawyers.

Charles Russell Speechlys LLP, one of Europe's oldest and premier law firms, is headquartered in London with offices in the UK, Europe, the Middle East and Hong Kong. Charles Russel Speechlys has used cleanDocs and RMail for several years. Abba Abbaszadi, Head of Information Technology, said the integration will be embraced by the firm's staff. "Our lawyers are often working to a deadline, so the fewer pop-ups or checkboxes they see, the better. Bringing all the security and compliance features of cleanDocs and RMail together on the same screen ensures our staff can work quickly and securely."