



Compliance Copies User's Manual

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Welcome

Thank you for choosing the Compliance Copies Add-In, created by Sperry Software. The Compliance Copies Add-In allows you to automatically send a CC (carbon copy) or BCC (blind carbon copy) to recipients of your choice whenever you send, reply to, or forward a message. Plus, you can send the CC or BCC based on different conditions, and to different people.

The Compliance Copies Add-In is helpful in situations where associates, such as assistants or supervisors, need to be copied on your email messages, or when you want to send a copies of your messages to different email addresses.

Using options in the configuration area of this add-in you can choose to have *all* messages (including replies and forwarded messages) sent to various recipients, or you can set specific conditions that need to be met before the copy is sent.

You can also choose whether the copied message will be sent as a standard carbon copy (CC) or as a blind carbon copy (BCC). You can easily disable the add-in if you won't be using this feature, or to allow you to enable it only when needed.

Tip: When using this add-in, it might be useful to set an exception of not allowing the BCC if the message is marked private. This way, personal emails to spouses can still be sent without forcing the BCC.

Configuring the Add-in

Once the installation is complete, you are ready to use Always BCC. When you open Outlook you will notice a new button “Sperry Software Add-ins” added to the toolbar.



Figure 1 (Outlook 2007 image shown)

Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in’s functionality.

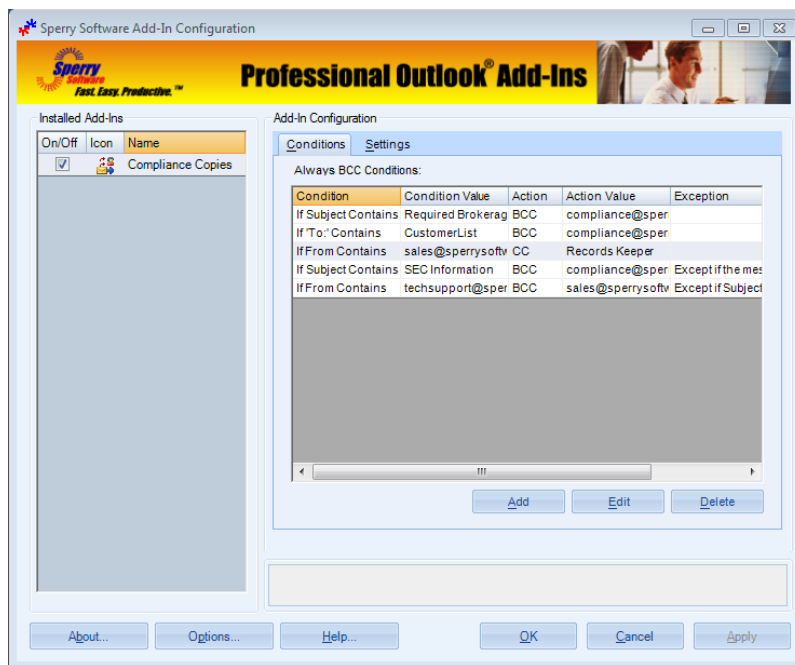


Figure 2 (Image of several conditions in place)

Compliance Copies Configuration

The first thing you see are the **Add**, **Edit** and **Delete** buttons. These are used to setup the various conditions under which a BCC or CC are to be performed. The first thing to do is to setup the first condition for a BCC or CC action to take place by clicking on the Add button. Doing so brings up the Add/Edit Configuration window where multiple different conditions can be specified. Once several conditions have been created, they can be edited or deleted as well.

Add/Edit Configuration Window

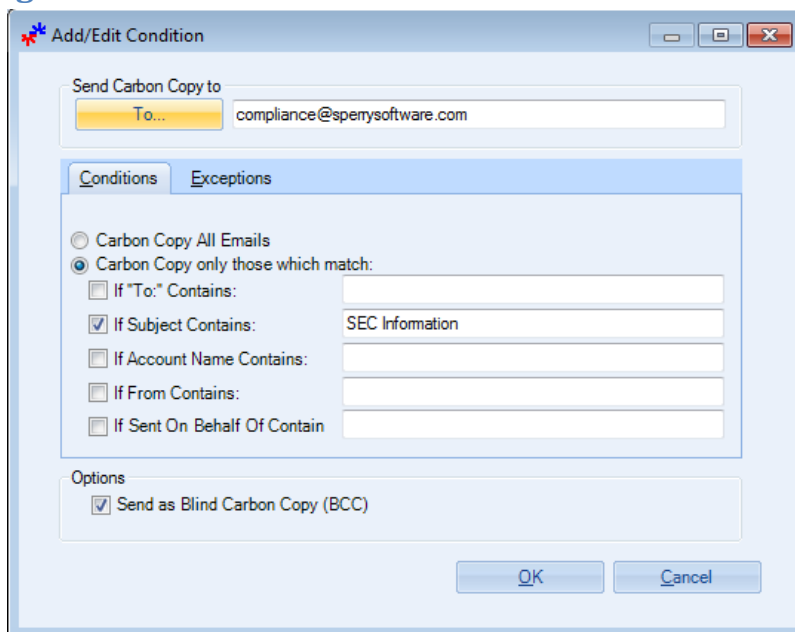


Figure 3 (One of the conditions being edited)

In Figure 3, we can see that one of the conditions is being edited. In this case, the Compliance department at Sperry Software is going to be BCC'ed if the subject of any sent emails contains SEC Information. The individual fields are explained below:

Send Carbon Copy To: Allows you to specify who the recipient of the CC or BCC will be. Choose a name from your contact list by clicking the "To:" button, or type an email address in the text field. You can separate multiple email addresses by using a semicolon between them. For example:

"compliance@sperrysoftware.com; sales@sperrysoftware.com"

Conditions allow you to specify under what conditions the CC or BCC will be sent. You can choose to CC or BCC all messages, or only when the specified conditions are met.

Carbon Copy All Emails: Sends a copy email to the indicated recipient every time, when you send, forward, or reply to any email.

Carbon Copy only to those which match: Sends a copy email to the designated recipient only when the specified criteria is met. The options here are "If 'To:' Contains", "If Subject Contains", "If Account Name Contains", "If From Contains" and "If Sent On Behalf Of Contains". All of these options take wildcards, are not case sensitive, and multiple values can be entered using semicolons.

A word about using wildcards: A wildcard is denoted with an asterisk and is used to match partial words or phrases. For instance, car* would match car, carnival or carriage. In the above example where the subject had to contain "SEC Information", if all emails with "SEC" in the subject had to be BCC'ed, then we could have used "SEC *" to match "SEC Information" or "SEC Info" or "SEC Brokerage Rules". Of

course, you could always create separate rules for each condition you need, but the wildcards help to consolidate the number of conditions needed.

The “Options” frame allows you to have the copied messages sent as blind copies (BCC) rather than standard carbon copies (CC). A blind carbon copy is one where the To or CC recipients cannot see the email address you specified in the “To” field.

Specifying Exceptions

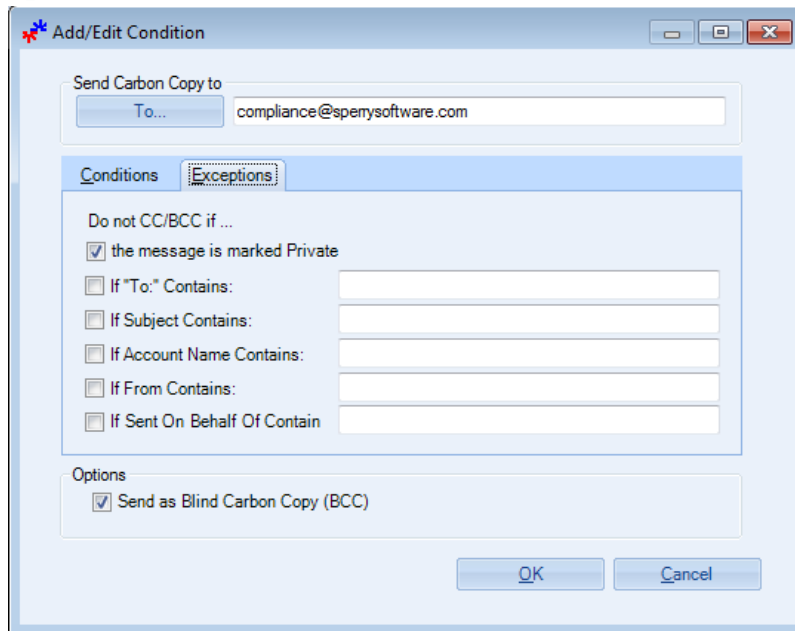


Figure 4 (Make an exception if the message is marked private)

In Figure 4, we can see that one of the conditions is being edited. The options are analogous to the **Conditions** tab, and wildcards are accepted here as well. In this case, the BCC will not take place if the email message is marked Private. You can mark email messages as private before sending them by going to Options...More Options...and pull down the Sensitivity list, then choose **Private** (as shown in Figure 5).

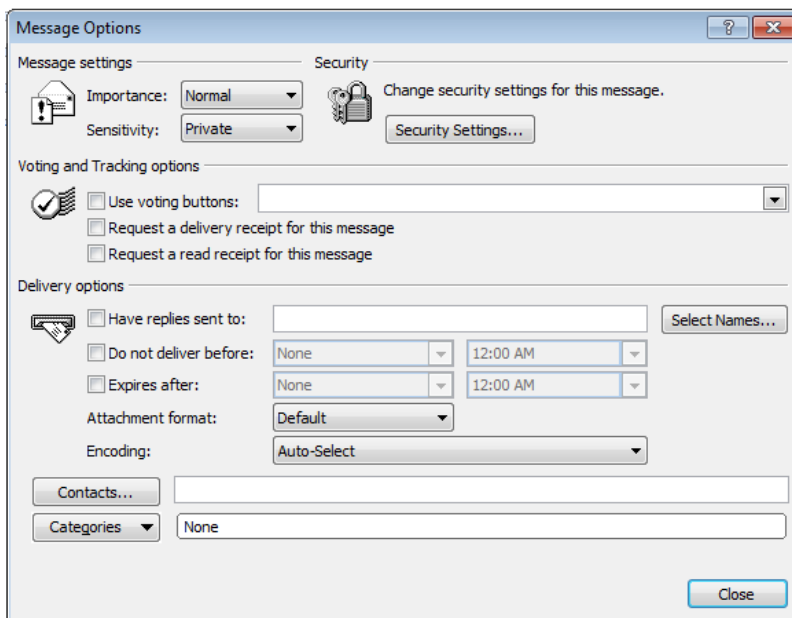


Figure 5 (How to mark a message as Private)

Settings Tab

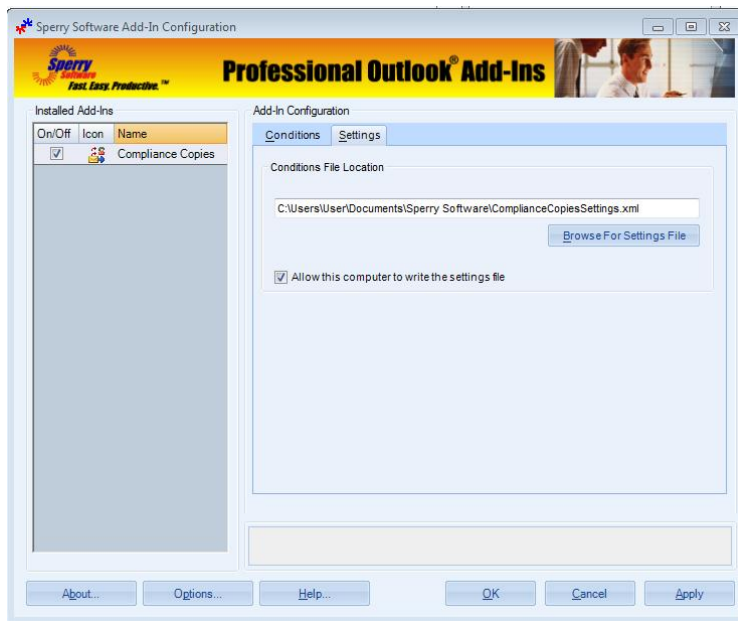


Figure 6 (Settings Tab)

The tab is used to configure just two options, and both are designed to be useful in corporate settings.

The first option is used to determine where the add-in stores the conditions that have been specified above. It is always a file called ComplianceCopesSettings and it is always stored in the user's Documents until otherwise directed somewhere else. This setting is useful so that users can share the

settings among multiple machines and each user does not have to setup the add-in. It is most useful if the settings file is stored on a shared network drive. Note that the settings file is stored in XML format, and thus can be easily edited directly if necessary.

The second option is a checkbox that controls whether this machine is allowed to write the settings file. This is useful in some corporate settings that prefer to not allow every user to change the settings. This option is most useful when combined with the Sperry Software customization build services, where the option can be both turned off and disabled. Please contact sales@sperrysoftware.com for more information about this service and the other customizable options.

Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from
<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, see our [Knowledge Base](#).