# Product Demo for NeoCertified Software

*(Start with the NEOCERTIFIED's customer presentation PowerPoint. Continue below when you are ready to show the software (When the PowerPoint slide, "Show Me NEOCERTIFIED" appears). Actions are in **bold blue**. Specific sections of the demo are in **bold orange**.)*

Now let's take a look at the product.

Before we do, what are the top 3 things you want to see?

*(compile the attendee's list to review later)*

Okay, good. I'll first prove to you how NeoCertified is one of the best secure email messaging applications, features some of the best software integrations & compliance packages, and, then I'll zero in on the specific items you just mentioned. Does that sound good?

Let's get started.

**(NeoCertified Web Portal)**

- Let's start by quickly logging in to the NeoCertified Secure Web Portal. This entire portal is compliant with HIPAA / FINRA / SEC / GLBA / SOX and many more federal regulations.

- As you can see, you have a standard email platform layout which features an Inbox, Track Sent, Drafts, and Trash Folder

- **Now, let's go ahead and click the "Compose Mail" button** near the top to see what composing a new secure email message really looks like
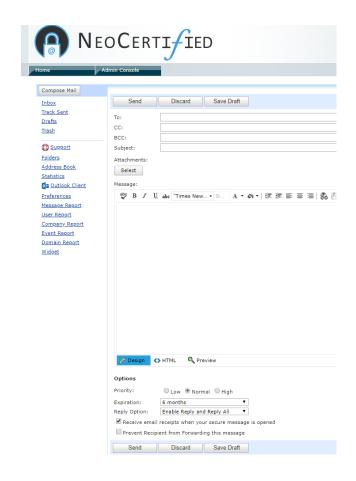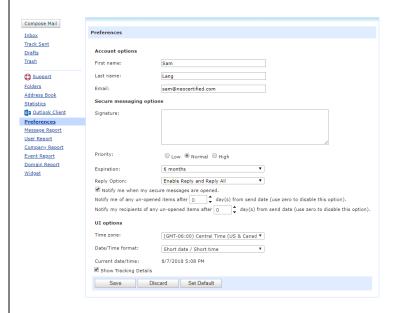
**(Composing A New Message)**

- When composing a new secure email message, you'll have your standard "To", "CC", "BCC", and "Subject" fields. You'll have an address book to easily navigate your favorite recipients, and you're able to attach up 100 MB in documents to each message
- **Here, let's compose a test email address in the "To" field and a test subject line in the "Subject" field**
- **Then we click the "Select" button under attachments to try it out**
- **Now, we compose the body of your message**
- Notice the "Priority" options, the "Expiration" options to set custom message expirations, and the "Reply Option" to enable or disable message replies
- You can even choose to receive read-receipt notification emails when your secure message has been opened
- You can also prevent the message from being forwarded
- **Select the options you'd like to test and then we click "Send"**
- See how easy that was? Do you have any questions before moving forward?

**(User Preferences)**

[**Now click the "Preferences" link in the side column**]

- Here, you can set your custom preferences for your secure email account
- **Set up your own signature block to see how it works**
- Below, you can see the "Priority", "Expiration", and "Reply Option" fields which can be set for all outgoing secure messages
- You can also enable notifications to be sent when the message has been read, when messages remain unopened for a specified amount of time, and to remind your recipients they have a secure message that needs to be opened
- **Go ahead and set your "Time Zone" and your "Date/Time field"**
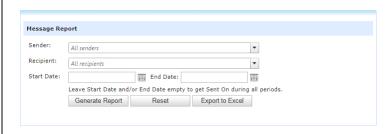
## (Message Reporting)

- [**Click the "Message Report" link in the side column**]
- This is where you can run specific message reports about both incoming and outgoing secure messages.
- You can search by "Sender", "Recipient", and the "Start Date" & "End Date"

- This is the same format for the "User Report"

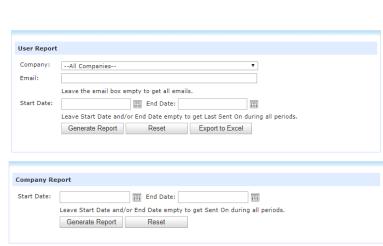- And similar format for the "Company Report" and "Event Report"

**Message Report**

| | |
|---|---|
| Sender: | All senders |
| Recipient: | All recipients |
| Start Date: | End Date: |

Leave Start Date and/or End Date empty to get Sent On during all periods.

Generate Report  Reset  Export to Excel

**User Report**

| | |
|---|---|
| Company: | --All Companies-- |
| Email: | |

Leave the email box empty to get all emails.

| | |
|---|---|
| Start Date: | End Date: |

Leave Start Date and/or End Date empty to get Last Sent On during all periods.

Generate Report  Reset  Export to Excel

**Company Report**

| | |
|---|---|
| Start Date: | End Date: |

Leave Start Date and/or End Date empty to get Sent On during all periods.

Generate Report  Reset

## (Secure Outlook Button)

[**Now, click on the "Outlook Client" link in the side column**]

- This is where each user can download their Secure Outlook Button
- Simply click the link inside of the box that says "Download Outlook Client" to begin the installation
- Follow the prompts that appear in the installer guide to install your own Secure Outlook Button

  Do you have questions about how to download the Outlook Button?

**Outlook Client**

This website is not the only place where you can send and read your secure email. You can do that from within Microsoft Outlook® leveraging absolutely the same skills you learnt while working with classic email. Please download and install the NeoCertified Outlook® client that enables you to send and receive your secure email using Microsoft Outlook® 2007, 2010, 2013 and 2016.

If you use Office 365 Outlook webmail and would like to install the NeoCertified add-in there, please contact support@neocertified.com.

Download Outlook® client 4.7.0
Please ensure that the button (.MSI) will be downloaded to a safe location where it cannot be quarantined by anti-malware audit tools.

**Installation instructions**

1. Close Microsoft Outlook ® if it is opening.
2. Download NCM Outlook ® Client using the hyperlink above.
3. Install NCM Outlook ® Client. If you are using Windows 7 or Windows 10 then please see our step by step installation guide
4. Launch Microsoft Outlook ®.
5. The NCM button should appear on your Outlook window.

## (Statistics)

[**Click the "Statistics" link in the side column**]

- This is where you can see how much storage has been used, how many messages have been sent, and how many messages still are in the trash
- Each user is allocated 1 GB of free storage space

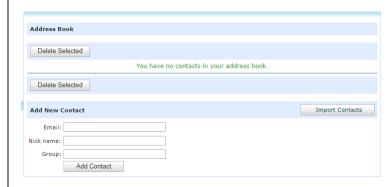| | |
|---|---|
| **Statistics** | |
| Logged as: | Sam Lang (member since 10/13/2017 8:13 PM) |
| Email: | **sam@neocertified.com** |
| Last Visit: | 8/7/2018 9:43 PM (22 visits total) |
| Disk Space Limit: | **unlimited storage** |
| Disk Space Available: | **unlimited storage** |
| Inbox: | 0 message(s) |
| Sent: | 0 message(s) |
| Drafts: | 1 message(s) |
| Trash: | 3 message(s) |
| eBIZ Plan: | **N/A** |
| License Start Date: | N/A |
| License End Date: | N/A |

## (Address Book)

- **[Click the "Address Book" link in the side column]**

- This is where you can "Import Contacts" and create new contacts for your address book.

**Address Book**

Delete Selected

You have no contacts in your address book.

Delete Selected

**Add New Contact**          Import Contacts
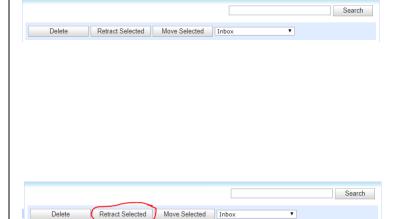
Email:
Nick name:
Group:
Add Contact

## (Track Sent Folder)

- **[Click the "Track Sent" link in the side column]**

- Inside of the "Track Sent" folder, you can see all of your previously sent secure email messages
- **So, let's select the checkbox next to previously sent secure email that we sent a few minutes ago**
- **Click the "Retract Selected" button**
- This feature allows you to permanently retract a previously sent secure message from your recipient's Inbox, so that they no longer have access to open the message

  Any questions about the "Track Sent" folder?

Search

Delete    Retract Selected    Move Selected    Inbox

Search

Delete    Retract Selected    Move Selected    Inbox

- **[Click the link that contains your name next to the "Sign Out" link]**

- **Select the "Personal Information" button**

- Here, you can edit your personal information, including "Name", "Email Address", "Street Address", "City", "State", "Country", & "Zip Code"
- You can also input optional "Phone Numbers", "Work Information", and you can change your "Password Question" and "Password Answer"



- **[Click the link that contains your name next to the "Sign Out" link]**

- You can select the "Change Password" option to change your current account password and you can view the "Account History"
- If you need to contact Customer Support, click the "Account Support" button to compose an email to the NeoCertified Customer Support Team



- Now that I've shown how NeoCertified is the best secure email messaging applications, and how it was simple to integrate and ensure compliance, what questions do you have? (IF THEY WERE NOT COVERED IN THE STANDARD DEMO).