



QUICK START GUIDE

MailMarshal Cloud Integrated Mode

MailMarshal Cloud is an email security, encryption, anti-virus and anti-spam service. With Integrated Mode, MailMarshal Cloud transparently scans messages sent through your Microsoft 365 (Exchange Online) organization.

This Guide highlights some configuration tasks that you should consider as you prepare your new MailMarshal Cloud instance for production.

The guide also highlights common questions about daily tasks you may want to perform.

For full details of the product features and web interfaces, see the MailMarshal Cloud Integrated Mode *Customer Guide* and the Web Console Help.

This document assumes that you have already provided provisioning details, and that you have received a MailMarshal Cloud Web Console login for the first administrator. For pre-provisioning tasks, see MailMarshal Cloud Knowledgebase article Q21242, [Pre-Provisioning for MailMarshal Cloud \(Integrated Mode\)](#).

Required setup items

On first login to the Web Console, you must complete the Configuration Wizard. You will accept the EULA and provide credentials to allow MailMarshal Cloud to access your M365 tenancy.

MailMarshal Cloud will configure required items in the tenancy.

When you are ready to begin scanning messages, you must enable mailflow in the Exchange Admin Center. See MailMarshal Cloud Knowledgebase article Q21243, [Enabling Mailflow from M365 to MailMarshal Cloud](#).

Suggested setup items

1. **Administrative Logins:** Create additional logins to the Web Console for your authorized email administrators and help staff.

2. **Policy Review:** View the Rule Summary in the Web Console to understand the filtering options that are configured.
3. **User Groups:** Create groups for use when customizing policy. You can create groups to contain external or internal users. You can also import groups of internal users through the Entra Connector.
4. **Policy Customizations:** Configure policy by enabling or disabling rules, and creating user group exceptions.
 - a. **Set up the Executive Names List** and consider enabling additional Business Email Compromise rules. See the BEC Fraud Protection document.
5. **Self-Service Management:** Set up message digests and SQM Console users to allow end users to manage messages that are blocked as spam, or quarantined for other reasons.

Daily administration items

Dealing with False Positives, Missed Spam, and Threat URLs: Quickly report messages that were wrongly quarantined, or not quarantined. Request classification of a URL in the LevelBlue Blended Threat system.

1 Administrative Logins

Each customer account for MailMarshal Cloud is originally provisioned with a single administrative login.

After logging in to the Web Console, you can add more administrative logins to the Console. You can set the functions of the Console that each login can access. You can choose:

- Parts of the Web Console that the login can view.
- Read Only or Read/Write access.
- Types of message actions or results the login can search for (such as quarantined or delivered messages).
- Classifications of messages within the quarantine folders that the login can view and act on.
- Groups of email users in your organization for whom the login can review and process messages.

To set up logins, in the Web Console see **Administration > Logins**.

2 Policy Review

MailMarshal Cloud provides a number of email policy packages. Depending on the service selected, a customer will be provisioned with one or more of the following:

- **Standard Protection:** Provides scanning and control of outbound content to protect against breaches of data privacy or confidentiality.
- **Advanced Protection:** Provides real-time scanning of URL links in messages, to protect against malicious links.
- **Data Protection:** Provides scanning of outbound messages for sensitive material.
- **Acceptable Use:** Provides scanning and control of content (language and images) to help maintain a safe work environment and protect your organization's reputation.
- **Secure Email Encryption:** Provides the ability to encrypt outbound messages based on email addresses or message content.

In addition, some policies are enforced for all customers.

For a full list of available policies, see the MailMarshal Cloud *Policy Guide*. To review the policy actually in force, in the Console see **Rules > Rule Summary**. You may also be able to customize the policies (see "Policy Customizations," below).

3 User Groups

MailMarshal Cloud allows you to set up user groups (lists of email addresses). You can use Groups to configure custom policies for specific internal or external users.

To create and edit User Groups, in the Web Console see **Policy Elements > User Groups**.

You can also import groups of internal users through the Entra Connector.

4 Policy Customizations

After reviewing the default policy and creating required User Groups, you can choose to modify Package Policy rules.

Many of the default rules can be enabled or disabled, and/or configured to apply to certain User Groups.

To customize the policy, in the Console see **Rules > Customer Packages**. Click a particular package name to view a list of the included rules.

- Most package policies are permanently enabled and cannot be disabled. Most rules can be enabled or disabled.
- To enable or disable a rule, click the Yes/No slider for the specific rule.
- Most rules, as well as the Anti-Spam (Inbound) package, can be configured with user exceptions.
- To configure exceptions, click a **User Matching** link.



Note: Some basic anti-malware rules are required and cannot be disabled.

Best practice is to add information to the Executive Names list to assist with fraud protection (**Policy Elements > Executive Names List**). For details of additional fraud protection options, see the *MailMarshal Cloud BEC Fraud Protection* document.

5 Self-Service Management

MailMarshal Cloud allows you to set up self-management of quarantined email for internal recipients.

Self-service management features include the SQM Console website (Spam Quarantine Management), and periodic digests of blocked email.

5.1 SQM Setup

To set up the SQM feature:

1. Import a list of users (email addresses) that are allowed to use this site.
2. Set up a list of email classifications that can be reviewed and released by users.

In the Web Console, see **Administration > SQM Configuration**.

5.2 Digest Setup

Digests are listings of quarantined email messages. Normally, a separate digest is sent to each local email recipient if any messages addressed to them were quarantined.

To set up digests:

- Create one or more Digests. Each Digest can be sent one or more times a day. In the Web console, see **Administration > Message Digests**. You can select a template, and select which classifications to include.

6 Daily Administration Items

MailMarshal Cloud has an industry leading level of accuracy in classifying spam and valid email. However, you may find that legitimate messages have been quarantined as spam (false positive), or spam messages have been delivered to users.

The following options are available to help with messages that were blocked by spam detection (or other policies) but should not be blocked, and also messages that were not properly blocked.

Some of the options allow management to be delegated to email users.

The options are listed in order from the most specific, to wider actions that could reduce anti-spam effectiveness.

6.1 Release and report as "not spam"

This is the best method to notify the spam detection team of the issue. Customer administrators can take this action from the message history view in the management interface. For details, see MailMarshal Cloud Knowledgebase article [Q20205](#).

- Messages reported in this way will be reviewed quickly.
- All submissions are considered and help to improve future detection. The team cannot provide a personalized response to each submission. The team does not guarantee change for any particular submitted message.
- This method does depend on user request or administrative monitoring.

6.2 Report a false negative (delivered spam):

- If the message attracted a classification, you can search for it in Message History, select it, and click **Spam**.
- You can configure the Microsoft Report Button to send a copy of reported messages to the spam detection team. For details, see MailMarshal Cloud Knowledgebase article [Q21236](#).

If you are subscribed to Blended Threats Protection, you can report false positive and false negative URLs using a web form: <https://support.levelblue.com/submit-URL.asp>

6.3 Additional options

For full details of the options mentioned below, see previous sections of this document and also see MailMarshal Cloud Knowledgebase article [Q21199](#).

- **Message Digests:** You can set up digest notifications of blocked messages for users. These can be sent daily or even more frequently.
- **Spam Quarantine Management:** You can choose to allow access to the SQM web interface for end users. This site allows users to review and release messages.
- **End User "Safe" Lists:** You can choose to allow individual users to maintain a list of "safe senders". Mail to a user, sent from addresses in their "safe" list, will bypass a number of anti-spam checks.
- **Rule Exceptions:** Some rules in the Standard Protection package can have "user matching" exclusions based on the sender, recipient, or sending IP address. This option should be used with caution if other actions do not resolve the issue.

About LevelBlue

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