

The Importance of Whitelisting- Prepping Your Boards for Receiving Emails

Whitelisting an email address ensures that messages from a specific sender are always delivered to your inbox and do not end up in the spam or junk folder.

We strongly recommend each board member whitelists our email address before invitations are sent out. This ensures emails land in their inbox.

no_reply@filefincen.com

Important: If a board member marks any email as spam at any point during the process, they will be immediately removed from the database and blocked from receiving future communications. This could hinder the completion of your association's BOI report.

Whitelisting Instructions by Platform

The process varies slightly depending on the email service or client being used. See below for general instructions for some popular platforms.

For Gmail (Google Mail):

1. Open Gmail.
2. In the top right corner, click the **gear icon** and select **See all settings**.
3. Navigate to the **Filters and Blocked Addresses** tab.
4. Click **Create a new filter**.
5. In the **From** field, enter the email address or domain no_reply@filefincen.com
6. Click **Create filter**.
7. Check the box that says **Never send it to Spam**.
8. Click **Create filter** to save the changes.

For Outlook:

1. Open Outlook.
2. Go to **Settings** (gear icon) and click **View all Outlook settings**.
3. Under **Mail**, click on **Junk email**.
4. In the **Safe senders and domains** section, click **Add**.
5. Enter the email address or domain you want to whitelist no_reply@filefincen.com
6. Click **Save**.

For Apple Mail (iCloud):

1. Go to **Mail** on iCloud.com.
2. Open a message from the sender you wish to whitelist.
3. Click the **More** icon (three dots) next to the sender's name.
4. Choose **Add to VIPs**. This will prevent the email from being marked as spam.

For Yahoo Mail:

1. Sign in to your Yahoo Mail account.
2. Go to **Settings** and click **More Settings**.
3. Select **Filters**.
4. Click **Add new filters**.
5. In the **From** field, enter the email address you wish to whitelist.
no_reply@filefincen.com

6. Under **Then move the message to this folder**, select **Inbox**.
7. Click **Save**.

For Microsoft Exchange (Office 365):

1. Go to the **Admin Center**.
2. Navigate to **Mail Flow > Rules**.
3. Click **Create a new rule**.
4. In the **Apply this rule if** field, choose **The sender is**.
5. Enter the email address or domain. no_reply@filefincen.com
6. Under **Do the following**, select **Bypass spam filtering**.
7. Save the rule.

For AOL Mail:

1. Open AOL Mail.
2. Go to **Options** and select **Mail Settings**.
3. Click the **Spam Settings** tab.
4. Under **Allowed senders and domains**, enter the email address or domain you want to
whitelist. no_reply@filefincen.com
5. Click **Save Settings**.

These steps will help ensure emails from a trusted source, such as a business, land in the inbox. You can share these instructions with customers or partners depending on the email service they use.