1 SPX Templates

On the *SPX Encryption > SPX Templates* tab you can modify the existing Default Sophos Template, and you can define new SPX templates. If using SMTP Simple mode, a global SPX template can be selected for all SMTP users on the *SMTP > Global* tab. If using SMTP Profile mode, you can assign different SPX templates to different SMTP profiles on the *SMTP Profiles* tab.

To configure SPX encryption, proceed as follows:

1. **Click *New Template*.**
   The *Create SPX Template* dialog box opens.

   > **Tip –** The Sophos Default Template contains useful settings and example texts. Therefore you should consider to clone the existing template using its *Clone* button instead of creating a new template from scratch.

2. **Make the following settings:**
   Template name: Enter a descriptive name for the template.

3. **Make the following basic settings:**
   Comment (optional): Add a description or other information.

   Organization name: The organization name will be displayed on notifications concerning SPX, sent to the administrator or the email sender, depending on your settings.

   System email address: The email address that will be used as the From address of notifications.

   PDF cover page: Select if you want the encrypted PDF file to have an additional first page. You can use the default page or a custom page. In case of the custom page, upload a one page PDF file via the Folder icon.

   PDF encryption: Select the encryption mode of the PDF file. Note that some PDF viewers cannot read AES / 256 encrypted PDF files.

   Label languages: Select the display language of the labels in the email forwarded to the recipient. The email contains fields such as *From*, *To*, *Sender*, or *Subject*, for example.

   Page size: Select the page size of the PDF file.

   Remove Sophos logos: Enable this option to replace the default Sophos logo with your company logo specified on the *Management > Customization > General* tab. The logo will be displayed in two places: on the footer of the encryption email sent to the recipient and in the footer of the reply message generated via the *Reply* button in the PDF file.

4. **Make the following password settings:**
   Password type: Select how you want to generate the password for accessing the encrypted email message. No matter which type you select, the sender always has to take care of transferring the password in a safe way to the recipient.

   - **Specified by sender:** Select if the email sender should generate the password himself. In this case, the sender has to enter the password into the *Subject* field, using the following format: `[secure:<password>]<subject text>` where `<password>` is the password to open the encrypted PDF file and `<subject text>` is the random subject. Of course, the password will be removed by the UTM before the email is sent to the recipient.

     > **Note –** A template with this option should not be used in combination with Data Protection. With Data Protection, the sender does not know beforehand that an email will be encrypted and thus will not enter the password into the *Subject* field. When the UTM tries to SPX encrypt an email with no password specified, the sender will receive an error message with the information that the password is missing.

   - **Generated and stored for recipient:** The UTM automatically creates a recipient-specific password when the first email is sent to a recipient. This password will be sent to the sender. With the next email, the same password is used automatically. The password will expire when it is not used for a certain time, and it can be reset by the administrator, see the *SPX Configuration* tab.

- **Generated one-time password for every email:** The UTM automatically creates a new password for each affected email. This password will be sent to the sender.

Notification subject (not with the *Specified by sender* option): The subject of the email that is sent from the UTM to the email sender containing the password. Here you can use variables, e.g. `%%ENVELOPE_TO%%`, for the recipient's name.

Notification body (not with the *Specified by sender* option): The body of the email that is sent from the UTM to the email sender containing the password. Here you can use variables, e.g., `%%GENERATED_PASSWORD%%`, for the password.

> **Tip –** The Sophos Default SPX Template on this tab contains all available variables and gives a useful example of a notification.

5. **Make the following recipient instructions settings:**
   Instructions for recipient: The body of the email that is sent from the UTM to the email recipient containing instructions concerning the encrypted email. Simple HTML markup and hyperlinks are allowed. You can also use variables, e.g., `%%ORGANIZATION_NAME%%`.

> **Tip –** The Sophos Default SPX Template on this tab contains all available variables and gives a useful example of recipient instructions.

   Header image/Footer image: Select if the email from the UTM to the email recipient should have a header and/or a footer image. You can use the default image, which is an orange envelope with an appropriate text, or a custom image. In case of the custom image, upload a JPG, GIF, or PNG file via the Folder icon. The recommended size is 752 x 69 pixels.

6. **Make the following SPX portal settings:**
   Enable SPX reply portal: If enabled, the encrypted PDF file sent to the recipient will contain a *Reply* button. With this button the recipient can access the SPX reply portal to send an encrypted email reply to the sender.

   Include original body into reply: If enabled, the reply from the recipient will automatically contain the body of the original email.

   Portal header image/Portal footer image: Select if the SPX reply portal should have a header and/or a footer image. You can use the default image, which is an orange envelope with an appropriate text, or a custom image. In case of the custom image, upload a JPG, GIF, or PNG file via the Folder icon. The recommended size is 752 x 69 pixels.

7. **Click *Save*.**
   The SPX template will be created and appears on the *SPX Templates* list.

To either edit or delete an SPX template, click the corresponding buttons.