**Safeguard Send for Office 365 Questionnaire**

This questionnaire is used to determine what options and rules you and your users in your tenant will have. After you complete it, email it back to [sales@sperrysoftware.com](mailto:sales@sperrysoftware.com). We will implement your rules and let you know when it is ready. You will then be able to have your users begin using it by loading it into your tenant.

To start, we need to know what rules you need implemented. Items “a” through “d” are for the Standard and Professional tiers, and “e” through “j” are for the Professional tier only. You can copy & paste this section in order to specify multiple rules (up to three rules for the Standard tier, unlimited rules for Professional):

1. What is your order number:
2. Please list your company domains:
3. Rule Conditions: What should the rule look for in outgoing emails? You can choose from among these options, and if you choose more than one per rule, they are ANDed together (so to form an OR condition, create another rule):
   1. [ ] Act if the email is being sent outside of your company domain(s)
      1. List all your company domains:
   2. [ ] Act if the number of attachments is equal to or greater than [ ]
   3. [ ] Act if the number of recipients is equal to or greater than [ ]
   4. [ ] Act if sending to more than one external domain
      1. List all your company domains, only if you did not do this already above:
   5. [ ] Act if sending an email to particular recipients (you can include wildcards like “\*gmail.com”)
      1. List the recipients and/or domains:
   6. [ ] Act if the subject [ ] *contains* or [ ] *does not contain* certain keywords
      1. List the keywords to look for:
   7. [ ] Act if the body [ ] *contains* or [ ] *does not contain* certain keywords
      1. List the keywords to look for:
   8. [ ] Act if any attachments [ ] *contains* or [ ] *does not contain* certain keywords
      1. List the keywords to look for:
   9. [ ] Act if the email subject contains a pattern (like a credit card number, SSN, or other account number)
      1. Name the pattern to look for (SSN, drivers license, bank account, etc):
      2. List the pattern to look for (NNN-NN-NNNN for SSN, etc):
   10. [ ] Act on any send
4. Rule Actions: Define what should happen if the conditions above are violated:
   1. [ ] Do not allow the message to be sent at all
      1. Display this message (appears as an Office Mailtip):
   2. [ ] Display a warning prompt
      1. Warning prompt text:
      2. ( ) Use Yes/No buttons (yes sends, no does not allow send)
      3. ( ) Use Ok/Cancel buttons (Ok sends, Cancel does not allow send)

Next, we need to know what general overall settings you prefer:

1. Normally, a toolbar button is shown in the desktop client, and in other places in other Outlook clients. Would you like the icon to continue to appear [ ] or hide it [ ]?
2. Normally, we track usage in order to monitor the popularity of various features, in order to improve the product. Would you like to take part in this anonymous non-personalized tracking [ ] or not [ ]? Note that this is different than our exception tracking (which is always on by default) in order to provide proactive error corrections both for you and other customers.
3. Please leave any other comments/concerns/questions you have for the developers:

That’s it! Please send this completed questionnaire to [sales@sperrysoftware.com](mailto:sales@sperrysoftware.com). We will enroll your domain and these rules into your configuration, and email you back to let you know when it is ready, and how to enable it for all users in your Office 365 tenant (if you haven’t done it already).

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Thank you for your business!