Safeguard Send for Microsoft 365

An Outlook Add-In by Sperry Software

Frequently Asked Questions

The Safeguard Send add-in for Microsoft Outlook 365 helps to prevent mistakes when sending emails. Here are the most common questions about both the operation and management of the add-in. Note that this information was taken from https://www.sperrysoftware.com/Email-Tools/learn-overview/faq/, and it may contain newer information.

What are the basic steps to try it out?

1. Sign up for a free subscription, either here on the main website or find us on Microsoft Azure Marketplace (search for "Sperry Software").
2. A default rule is created for you in this process. The rule will cause a prompt to occur whenever you send an email outside your company.
3. Install the add-in into Outlook using the instructions on Installing Safeguard Send for Microsoft 365.
4. Send an email to say, a Gmail or Yahoo address to see the warning prompt.

What are the differences between signing up through Microsoft Azure versus signing up for a subscription directly from the Safeguard Send for Microsoft 365 main page?

When you use Microsoft Azure to sign up for a subscription, you are billed through Microsoft Azure billing. You can manage your subscription from your Microsoft Azure Subscriptions page, including changing the number of users, changing your plan, or cancelling the subscription altogether. You can also do these same things through the use of the Safeguard Send for Microsoft 365 dashboard.

When you sign up for a subscription directly, Sperry Software bills you either through PayPal or we can invoice you directly. Direct invoicing is sometimes necessary if companies require that a quote/purchase order/invoice flow be sent for ongoing subscription payments. You can still navigate to the Safeguard Send for Microsoft 365

dashboard to change the number of users, change your plan, or cancelling the subscription altogether.

If you wish to be billed automatically by PayPal, you can simply sign up for any of the tiers from the Safeguard Send for Microsoft 365 main page (that is, Add To Cart, then complete the typical checkout purchase). If you wish to use direct invoicing, please email us at techsupport@sperrysoftware.com with the subject "*Quote Requested*" and we can take it from there.

How do I manage rules for an entire company instead of just me?

If you signed up for any paid tier, you can simply choose to edit the rules for an entire domain as instructed here.

Otherwise you first have to subscribe to a plan that offers this (either Standard or Pro). To do this, you can either choose to cancel/unsubscribe the current individual subscription then sign up for a paid tier using that same Microsoft 365 email address you used the free tier. Note that when you unsubscribe that all your information is deleted immediately so you might want to take screenshots of your settings if you want to recreate your rule(s) in your new subscription.

Alternatively, you can use a different email address (which must still be a Microsoft 365 email address) to sign up for any paid tier, as long as that different email address has the same domain that you want to create rules for.

What happens if two different IT admins from two different branches signup multiple users?

The 2nd IT admin to attempt to subscribe their domain will receive an error with the message "A subscription already exists for your domain." To get in touch with the IT Admin that has already subscribed your company domain, please contact us at techsupport@sperrysoftware.com.

What happens if two different Cloud Service Providers (CSPs) sign up the same company?

This is very similar to the above question where two IT managers sign up users in their respective branches. Basically, the 2nd CSP will not be allowed to continue. To resolve this problem, please contact techsupport@sperrysoftware.com for help resolving this problem.

What happens if an individual existing user has already signed up, and then an IT Admin from the same company subscribes multiple users or an entire company?

When an IT Admin signs up multiple users, the Safeguard Send dashboard creates a rule that applies to anyone from that domain. However, when the client side add-in goes to fetch a particular user's rules, it first looks to see if there are rules for that particular user's email address first. If there aren't any, then it looks for that user's domain based rules.

Knowing this, even if an IT admin signs up his entire company, that one individual existing user's rules will still be fetched and used before the entire domain rule(s). In other words, nothing will happen to the existing user, and no rules that the IT Admin applies will take effect for the existing user. All other users will begin to see the IT Admin's domain based rules.

To diagnose and fix this condition, you can reference the subscription Id found on any page of the dashboard, then compare the one from the individual user to the one the IT admin has. If they are different, then the individual user can unsubscribe/cancel their subscription. At that point, the IT Admin's domain rule will begin to take effect.

Can two users from the same company sign up for individual subscriptions?

Yes, each user will have access to their own dashboards to control their own rules.

More Information

Learn more about the dashboard used to control your rules at https://www.sperrysoftware.com/Email-Tools/learn-overview/.