Email Authorization and Survey Security Compliance

All new Alchemer accounts created after January 25th, 2022 must be provisioned Email Action and Email Campaign authorization from Alchemer before scheduling and utilizing the email action or campaign features in the Alchemer platform.

Only account administrators have access to the email authorization form.

Alchemer takes customer data and accounts security compliance seriously. With recent changes in the well-being of cyber security, Alchemer has taken steps to prevent and mitigate the use of the platform for malicious intent. From the user experience, a few changes have been implemented where accounts must receive email authorization to fire messaging from the platform. This is also true for testing functionality to help increase security and prevention of phishing/scamming emails. Below explains the steps needed for the successful use of email actions and campaigns in the Alchemer platform.

Special considerations:

- Existing customers with accounts created *before* January 25, 2022, will <u>not</u> need to gain authorization before sending email actions.
- If an account created before the aforementioned date has never requested Email Campaign or Email Action authorization prior to this change, the account may still be prompted to complete the authorization form.
- **3.** Authorization to send *Email Campaigns* or *Email Actions* typically results in approval for both features within the Alchemer platform. A user must fill out the authorization form to either feature to gain access to both email capabilities.

Email Action Authorization

Alchemer users when creating a survey project leveraging email actions see the following experience when adding an email action and editing it within an existing project:

	∧lchemei		BUILD STYLE TEST SHARE RESULTS - TOOLS -	Edit Action		
88			음 Add	PRIMARY SETUP	ADVANCED	♥ Need Help?
<u>्</u> छ	Audience Design Library	-	Page 2: Add Page Title	Sending an email is Click here to get authorized Learn more about why write	currently not allowed	
8 2	Research Library	•	Send Email Action New Send Email Setup is not complete. You are missing required information.	Name	anna na maraga	
0	Account	-	() Inser	New Send Email		
\Diamond	Support Center		4	From Name	Quick fills: Me Survey Taker	
<u>Au</u>	Alchemer University			From Address Reply To	noreply No Reply <	@alchemer-thrall.com (Alchemer) +
0	Security	•	Thank You Page: Thank You!	То	Comma Separated Quick Ritis: Me J Survey Taker	Add BCC
			Responses are marked as complete when they reach this page	Subject	New Response Notification	
			Thank you for taking our survey. Your response is very import	This is sample text (replace with Email Uses You can use email auto-respons make sure to ask for their email	ryour own). Gen to send you survey takens a thank you, a follow up, or a copy of the survey results to yours address somewhere in your survey. Use their email question merge code in the field above "Se under survivo.	elf. In order to email your customer d Email To: Email Address*.
			Getting Started Guide Survey Actions let you do all kinds of things with your surve ore of these to get started. Send Me a Confirmation Email Send Respondent a C			
						Cancel Save Action

1. Select the hyperlink within the red callout banner "Click here to get authorized" when editing an email action within a project:

4	Alchemer		BUILD STYLE TEST SHARE RESULTS - TOOLS - Edit Action
88	Projects		PRIMARY SETUP LOGIC ADVANCED
ېر مې	Audience		Sending an email is currently not allowed
Ø	Design Library	•	Page 2: Add Page Title Click here to get authorized Learn more about why you're seeing this message.
8	Research Library	-	Send Email Action
C	Integrations	•	Setup is not complete. You are missing required information.
٩	Account	•	INSTR
\heartsuit	Support Center		A From Name Quick fills: Me Survey Taker

2. Once selected, Alchemer displays the following popup form to gain email authorization from the platform:

about CAN-SPAM requirements.		
* Organization	Alchemer	
Website	www.mysite.com I	
* Phone Number	605-680-2554	
* Country	United States ~	
* Address	5915 Urban St.	
	Address Line 2	
• City	Arvada	
* State/Province	Colorado v	
* Zip/Postal Code	80004	
Account Primary Con	tact Information	
* Name	Alchemer Alchemer * Email	
Your Contact Information	tion	
	I am the primary contact on the account	
* Name	Alchemer Alchemer * Email	Þi
Your Contacts		
	 I have explicit permission to send emails to these recipients. I grant the Spam Prevention Team access to my account for review permission of the second secon	irposes.
		Cancel Submit

- **3.** Fill out all required fields, and populate both checkboxes under the **Your Contacts section** in the image above.
- 4. Select Submit to complete the form.
- 5. Once the form is submitted, Alchemer users see a confirmation banner display at the top of the Survey Builder screen, confirming the form has been submitted for review by the Alchemer Support team:

Alchemer	345	Request submitted	A Help A
Projects	BUILD STYLE TEST SHARE RESULTS - TOOLS -		
Audience			O View Settings

6. The Alchemer Support team will contact the Alchemer user confirming necessary action has been taken to allow email actions to be sent from the survey.

Email Campaign Authorization

Below explores the Email campaign Authorization process.

<u>Note:</u> if an Alchemer user has been approved from the authorization form for email actions, an Alchemer user will be approved for email campaign authorization as well. Please contact your Customer Success Manager or the Alchemer Support team if one wishes to restrict email campaigns on an account while enabling email actions.

1. Navigate to the Share tab, scroll down to Source Tracking, select Send via Email Campaign, and title the Email Campaign:

Alchemer	Employee Connection Pulse		Help	
2 Projects	BUILD STYLE TEST SHARE RESULTS . TOOLS .			
Audience	•		View 9	ettings
Design Library -	Page 1: Employee Connection Pulse ID:1	view a	* +	8 ×
 Account Support Center 	 Tips on using this template! This template is to help jump start your survey project. You can edit or remove any question that does not apply to your project. Looking for information on how to style your survey? Check out the Style Your Survey Tutonal! 		✓ Edit Move (2) Copy ★ Remo	re
Alchemer University	ID-37 Tros Text / Instructions Admin Only			
	1. Department - Please Select - v ID: 9 Type: Dropdown Manu		 ✓ Edit 	ra
	2. How are you feeling? *		🖋 Edit	

2. Within the campaign builder, navigate to the **Contacts section**, adding all contacts intended for the campaign:

	L Campaign I	Designer 2 Contacts 3	Send Campaign 4 Delr	very Statistics	Advanced Settings
am	ipaign Summary	Contacts			
0	Create / Edit your Messages 1 Invite	1 Active 0 Inactive 0 Unsubscribe	d 0 Removed	search	Q
0	Upload your Contact List 1 Contacts Uploaded	🗆 Email 🔺	First Name	Last Name	Status
	III View import log	1 million and	101148	in sec.	-
0	Send / Schedule Campaign not sent yet	Select a Bulk Action - Export Co	ntacts with Send Status		

3. After contacts have been added to the campaign, navigate to the Send Contacts section of the campaign builder. Under the Scheduled for column, select the hyperlink Click here to get authorized for email:

You have used 0/10,000 monthly email sen	ds		
ste: Sending emails through a custom SMTP integra	tion will bypass these limits. Click here to learn more		
1 Campa	ign Designer 😢 Contacts 🕄 Send	Campaign 1 Delivery Statistics	Advanced Settings
Campaign Summary	Send Campaign		
Campaign Caminary	Send Sampaign		
Create / Edit your Messages 1 Invite	Pending Contacts Message	Scheduled For	Send/Schedule
Indexed using Constant Lint	0 [account("organization name")	needs your feedback! Click here to get authorized fi	or email
0 Contacts Uploaded			
Sand / Schedula	Note: Pending Contacts Does not include contacts that have already received	the message, bounced or unsubscribed contacts, any contacts	who have completed the survey,
Campaign not sent yet	nor any contacts over your plan limit. In the case of pl send unless you are using your own smtp server. Clic	an limits, you may buy credits to send more. Group emails (e.g. k here for more information.	sales@company.com) will not

4. Populate all the required fields within the authorization form that displays, ensuring both checkboxes at the bottom are populated:

Account Information				
* Organization	Received and a second s			
Website	www.mysite.com			
Phone Number	608-123-1234			
* Country	CONTRACTORNEY.	~		
* Address	10110000			
	Address Line 2			
* City	-			
* State/Province	10000	~		
* Zip/Postal Code				
Account Primary Con	tact Information			
* Name	denorm Setterat	* Email	-	
Your Contact Informa	tion			
	I am the primary contact on the	account		
Your Contacts				
	• How did you obtain your	contact list?		
	I have explicit permission to s	end to these contacts (Doub	ele Opt In).	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
	I grant the Spam Prevention 1	feam access to my account f	or review purposes.	

5. Select Submit at the bottom of the form. A notification is fired to the Alchemer Support team to review the request. Once reviewed by the Support team, Alchemer users are notified of the status of the request, and are approved to leverage email sends from Alchemer!

Survey Compliance

If a survey is detected concerning the collection of ethically adverse information, an Alchemer account is required to provide support access for the Alchemer Support team to review the survey in an effort to ensure the survey build does not contain questions collecting private security information from potential respondents.

If a survey is marked as a security concern, an Alchemer customer is displayed the following on

their dashboard, depending on their current experience selected when viewing the platform:

Create New		>				Sort By + Filter +	Search	
All Surveys	2,53	34	A Feedback to be forement					
			12 Employee Login Survey					
			Warning Action Required					
			~					0
and the second s			ы					83%
			_					
Enterprise Solutions		1						
Enterprise Solutions		1						
Create New			-		Columns + Filter + Search	h	٩	
Create New	>				Columns + Filter + Search	h	٩	
Create New	2.534		Name	Responses	Columns - Filter - Search Date Last Edited	h Status ❤	٩	
Create New All Surveys Recent	> 2.534 5	х П = = 	Name Employee Login Survey ()	Responses	Columns - Filter - Search Date Last Edited	h Status 🗸 Warning	٩	
Create New All Surveys Recent	> 2.534 5 14	エ 三 二 公	Name Employee Login Survey ()	Responses	Columns - Filter - Search Date Last Edited Jan 30, 2020 5:54 pm	h Status 🗸 Warning Closed	Q 1	
Create New All Surveys O Recent	> 2.534 5 14 6		Name Employee Login Survey •	Responses	Columns - Filter - Search Date Last Edited Jan 30, 2020 5:54 pm	h Status ❤ Warning Closed	Q 1	
Creste New All Surveys O Recent	> 2.534 5 14 6 5		Name Employee Login Survey •	Responses 0 38	Columns - Filter - Search Date Last Edited Jan 30, 2020 5:54 pm Nov 19, 2014 5:01 pm	h Status 🗸 Warning Closed Closed	α 1 1	

An Alchemer customer must click the *Action Required* or the *Exclamation point* to begin a support interaction. Once selected, an Alchemer user must provide support access via the popup window that displays:

Create New	> = =	Sort By + Filter + Sea	rch Q
All Surveys 2,5	34		
	W		
B The P Land Land	_		
B - company - to - com		×	
Contraction of the local division of the loc	☆	Warning Weed Help?	24.00
B		We've detected a security concern with this survey. This survey is no longer available to	Avg per day Completion Rate
A Constant of the local diversion of the loca	. L.	respondents.	
B-1		You may submit this survey for review by Alchemer Support.	1
R to a to a to a		Continued security concerns on your surveys will result in account suspension.	2.00
B. COLOR	_	Enable Alchemer Support access to your account	Completion Rate
B control from the		Forever (No End Date)	
B		* I grant the Alchemer Support Team access to my account for review purposes.	1
B. Contraction of the local distribution of	12	Cancel Submit for Review	Zmin. 4 Length Overstions
B. contractor			
R. contract.			
B			
	2		1min. 1

There are two actions necessary for an Alchemer user to begin a survey review:

- 1. Provide the term in which the Alchemer Support team may access the account and survey project (7 Days, 30 Days, Forever).
- 2. Populate the checkbox to confirm access to the account for review purposes.

Once both fields are completed, The Alchemer Support team begins investigations and determines the impact of the survey, and takes the appropriate action given the use case. The team will close the loop with the account holder at the end of their investigations.