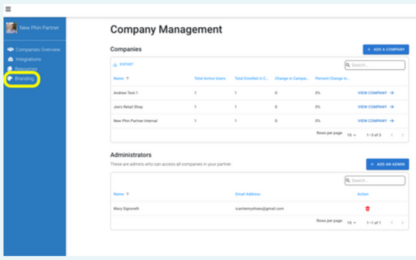
Phin Security Quick Set Up Guide

Setting up Security Awareness Training & Phishing for your Clients

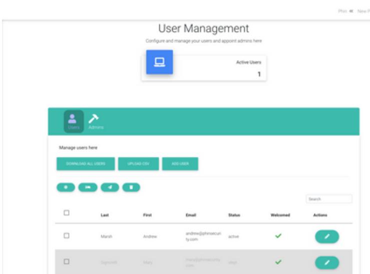
Step 1



Personalization

- Branding
  - Upload your logo (jpeg or png) with a transparent background
  - You will see a preview of light and dark mode
  - Branding at this level will be adopted by all of your clients - one and done!
- Clients
  - Add each client by clicking on +Create A New Company
  - Add admins here at the partner level, or within each company at the company level.
- Email Configuration
  - Email Settings - Allowlisting Guide
  - Configure Welcome Emails

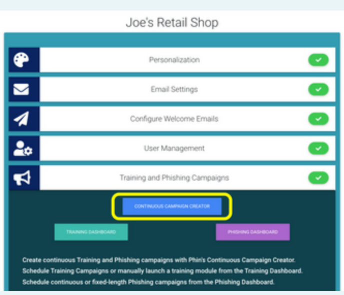
Step 2



User Management

- Choose your method to add users
  - Azure sync
  - Import CSV
    - Minimum requirement is first name, last name, and email
    - Use the template provided on the page
  - Manually
- After Users are added, you can set a user to:
  - Sleep (not receive any training or phishing)
  - Wake (receive training and phishing)
  - Send welcome email to
  - Delete

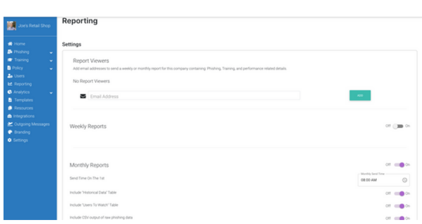
Step 3



Training and Phishing Campaigns

- Choose Continuous Campaign Creator
  - Complete the 7 question survey to build your custom training
- Set the training and phishing schedule
  - All campaigns are preset for the first Monday of the month
  - If you would like to adjust that schedule, check out these helpful articles
    - Configure Phishing campaign
    - Configure Training campaign

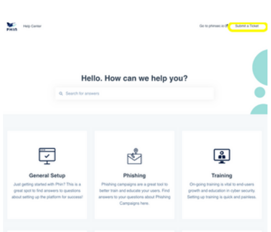
Step 4



Reporting and Analytics

- Use the Analytics tab on the left to view data on your campaigns
- To turn on reporting:
  - click on settings
  - set the reporting schedule as desired
  - add recipients to receive the reports
- If you would like to learn more about reporting and analytics, click here!

Step 5



Additional Resources

- Phin's Knowledge Base
- Submit a support ticket or feature request

PHIN