

# AutoPhish Campaign

## Partner User Guide



Questions/Concerns?

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# AutoPhish Step-by-Step Setup Guide

Step 1: Log in to your partner admin account and click “View” on a client

Home > Clients Profile | Clients | Branded Information

**Clients**

**Actions:** [New Client](#) [ESS Dashboard](#) [Configure Sync Messages](#) [Dark Web Monitoring](#) [Switch to Manager](#)

>> Partner Resources << >> Purchase BPP <<

Search

Name	Account Type	Manager Code	Employee Code	RA Completed	Registered Users	Created	Password Breaches	Active	Actions
Company	BPP				16	08/21/17 10:13 am	36	Yes	<a href="#">View</a> <a href="#">Edit</a>

Step 2: Scroll to the bottom of the screen and click “AutoPhish Campaign Schedule List”

Training Reports

Course Code	Course Name	Actions
SEC-102	Security Training	<a href="#">View</a> <a href="#">Export</a>
SEC-103	Security Training	<a href="#">View</a> <a href="#">Export</a>

Phishing Campaigns

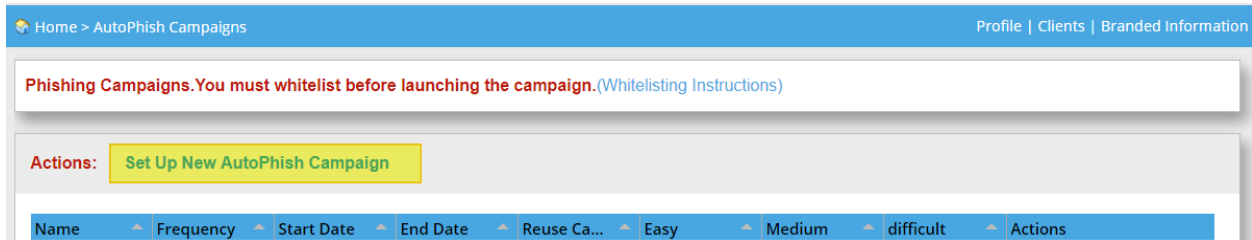
[Phishing Campaign List](#)

AutoPhish Campaign Schedules

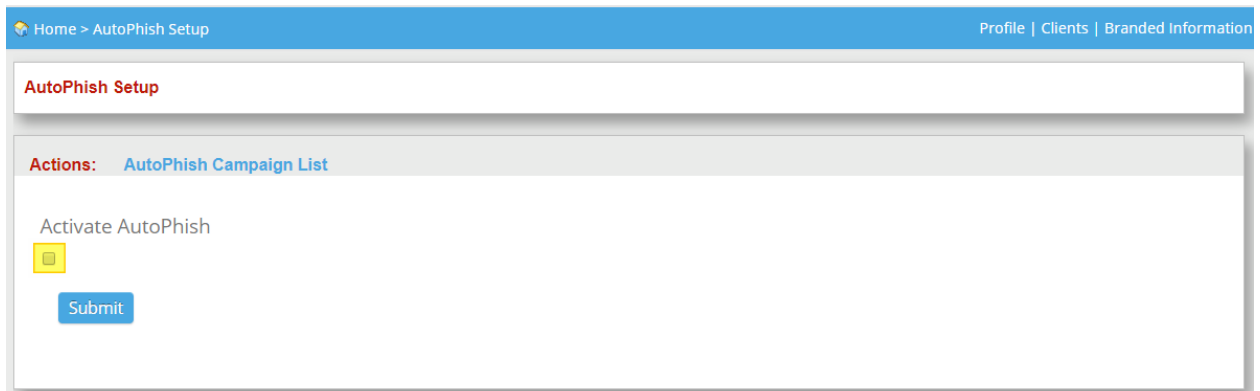
[AutoPhish Campaign Schedule List](#)

# AutoPhish Step-by-Step Setup Guide

Step 3: Click “Set up New AutoPhish Campaign”



Step 4: Select the check box under “Activate AutoPhish” to turn AutoPhish on for that client



# AutoPhish

## Step-by-Step Setup Guide

Step 5: Set up the parameters:

Home > AutoPhish Setup Profile | Clients | Branded Information

### AutoPhish Setup

Actions: [AutoPhish Campaign List](#)

Activate AutoPhish

Configuration Setting Name  **Configuration Setting Name** – Name associated with the AutoPhish settings.

Frequency of Campaigns  **Frequency** – Set to Monthly or Weekly, which determines how often the emails will be sent.

Every  Month(s) Start Date  End Date  Time :  :  EST time zone

**Every** – Determines how often the emails will be sent. Example: “Frequency” set to Monthly and “Every” set to 2 will send emails every 2 months.

**Start Date** - Date you want the emails to start. Default is current date. There will be a 2-day lag from the start date before emails will be sent, which allows you to review, edit or cancel a campaign before it gets launched.

**End Date** – Date you want the emails to end. Default is 365 days from Start Date.

**Time** – Time of the day you prefer the emails to be sent. Default is current time (as of opening the AutoPhish window).

**Set Difficulty** – Select any combination of Easy, Medium and/or Hard.

- Determines the complexity of the emails to include in the campaign.
- Selections here will be applied as a filter for the Included Scenarios below.

Set Difficulty  Easy  Medium  Difficult

Select Country  **Select Country** – Select any combination of countries.

- Determines which countries scenarios to include in the campaign.
- Selections here will be applied as a filter for the Included Scenarios below.

# AutoPhish

## Step-by-Step Setup Guide

### Step 5 Continued: Set up the parameters:

**Reuse Scenarios** – Select to recycle scenarios once all selected scenarios have been exhausted.

- Example: If you are sending a campaign once a week for 20 weeks but only have 10 scenarios in your included list, there will not be enough scenarios to last the entire duration of the AutoPhish campaign. If you do not select Reuse Scenarios the AutoPhish campaign will end. If you select Reuse Scenarios the AutoPhish campaign will continue using previously sent scenarios.

#### Reuse Scenarios

- Recycle scenarios once all selected scenarios below have been exhausted

#### Included Scenarios

Country	Phishing Scenario
US	Amazon Security Alert
US	DocuSign Signature Request
US	Webinar Reminder
US	Netflix Account Reset
US	Apple Account Update
US	Apple Itunes Invoice
US	Bank Account Low Balance - Bank of America
US	Bank Account Low

#### Excluded Scenarios

Country	Phishing Scenario
US	Tax Refund
US	Bank Account Low Balance - Generic Bank
US	Google Account Password Change

>>>

<<<

**Included Scenarios** – Select the scenarios to be included in the AutoPhish campaign.

- Click to highlight the scenarios you want to exclude and then click the >>> button to move them to the Excluded Scenarios box.
- To move a scenario(s) back to included, click to highlight the scenario(s) you want to include and then click the <<< button to move them to the Included Scenarios box.

# AutoPhish

## Step-by-Step Setup Guide

### Step 5 Continued: Set up the parameters:

**Include New Users** – Select to include new users.

- By default, any new users added to a client after creation of the AutoPhish campaign are excluded from future mailings. This allows you to control what AutoPhish campaign a new user will receive.
- Example: Say you have an AutoPhish campaign set up for Managers and a separate one set up for Employees. If you select “Include New Users”, a new user will be included in both AutoPhish campaigns, which may not be the desired result.

Include New Users

#### Users

Name	Email
Test, J1 BSN BPP E	j1bsnbpp@etest.com
Test, J1 BSN BPP M	j1bsnbpp@mtest.com
Test, J1 BSN BPP PA	j1bsnbpp@patest.com

#### Excluded Users

Name	Email
Test, J1 BSN BPP A	j1bsnbpp@atest.com
Test, J1 BSN BPP AL	j1bsnbpp@altest.com

>>>

<<<

**Users** – Select the users to be included in the AutoPhish campaign.

- Click to highlight the users you want to exclude and then click the >>> button to move them to the Excluded Users box.
- To move a User(s) back to included, click to highlight the user(s) you want to include and then click the <<< button to move them to the Users box.

Receive a reminder notification 2 days prior to launch

address to receive notification

I have whitelisted for this client. ([Whitelisting Instructions](#))

**Receive a reminder notification 2-days prior to launch** - Select this option if you'd like to receive a notification 2-days prior to the launch of the AutoPhish campaign. This will allow you to review, edit or cancel a campaign before it is launched.

- If you select this option, you will be prompted to input an email address where the notifications will be sent.
- This will also be used to notify you if the campaign has run out of scenarios and the Reuse Scenarios option has not been selected.

Submit

**I have whitelisted for this client** - Select this to confirm you have whitelisted for this client (link provided with whitelisting instructions).

# AutoPhish Step-by-Step Setup Guide

## Step 6: Click “Submit”

Things to note:

1. When an AutoPhish campaign has launched, it will appear in the Phishing Campaign List, where you can perform the standard actions: Report, View, Delete, or End Campaign

The screenshot shows a dashboard with three main sections:

- Training Reports:** A table with columns for Course Code, Course Name, and Actions. It lists two entries: SEC-102 and SEC-103, both for Security Training. Each entry has 'View' and 'Export' buttons.
- Phishing Campaigns:** A section with a yellow button labeled 'Phishing Campaign List'.
- AutoPhish Campaign Schedules:** A section with a blue button labeled 'AutoPhish Campaign Schedule List'.

2. The naming convention will be as follows:  
“AutoPhish Campaign Setting Name” – “Scenario Name”

The screenshot shows the 'Phishing Campaigns' page with a table of active campaigns. The table has columns for Country, Name, Launch Date, and Actions. A red warning message is displayed above the table.

Home > Phishing Campaigns Profile | Clients | Branded Information

**Phishing Campaigns.** You must whitelist before launching the campaign. (Whitelisting Instructions)

**Actions:** [New Phishing Campaign](#)

Country	Name	Launch Date	Actions
US	Sample AutoPhish Campaign-Amazon Security Alert	12/13/18	<a href="#">Report</a> <a href="#">View</a> <a href="#">Delete</a> <a href="#">End Campaign</a>

# AutoPhish Step-by-Step Setup Guide

# CONGRATULATIONS!

## AutoPhish Setup is Complete!

Repeat this process for each of your clients



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