Ver.2019.05.07

Bulk Manage Users .CSV Upload

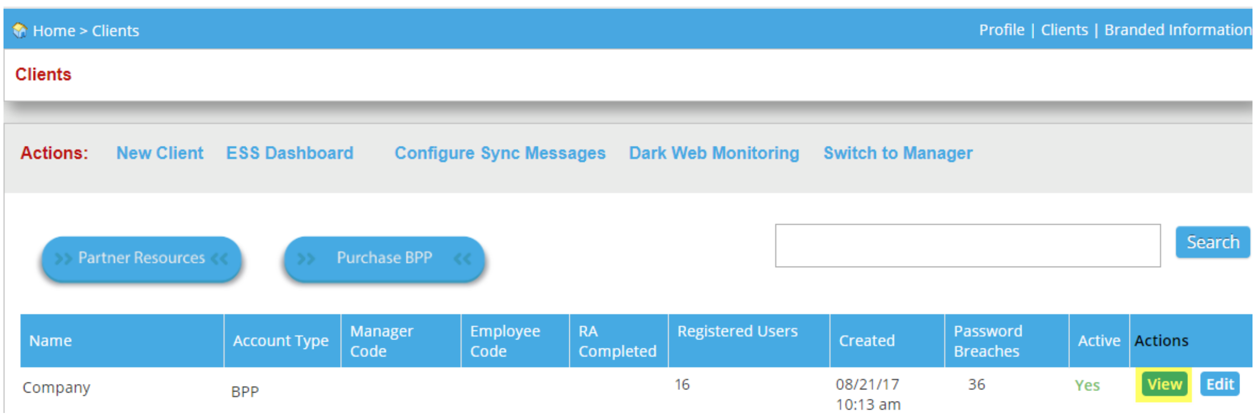
Partner User Guide

Questions/Concerns?

Email: Operations@breachsecurenow.com Phone: (877) 275 – 4545

Bulk Manage Users
Step-by-Step Guide

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



Step 2: Scroll down to the “Details” section and under users, select “Bulk Manage Users” to add, deactivate, or modify users via using the .CSV upload file here.

Bulk Manage Users Step-by-Step Guide

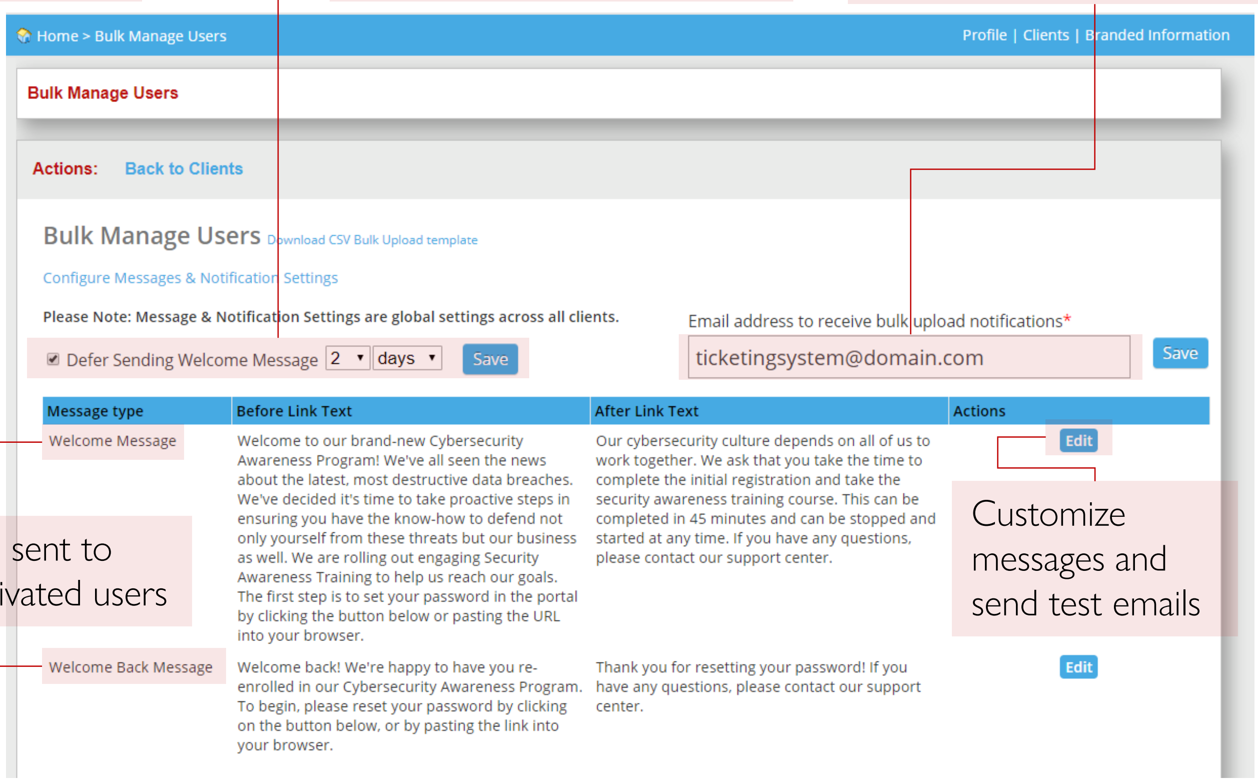
Step 3: Click "Configure Messages & Notification Settings" to customize welcome emails and defer the sending of welcome emails in the event you want to send simulated phishing campaigns before users are aware of your cybersecurity program.

Please note these are global settings across all clients. You **must** enter an email address for notifications before uploading your file.

Email sent to new users to the platform

Choose the time the system should wait before sending messages to modified users.

Best email to send success and error message notifications to. This should be a ticketing system or distribution list.



Email sent to reactivated users

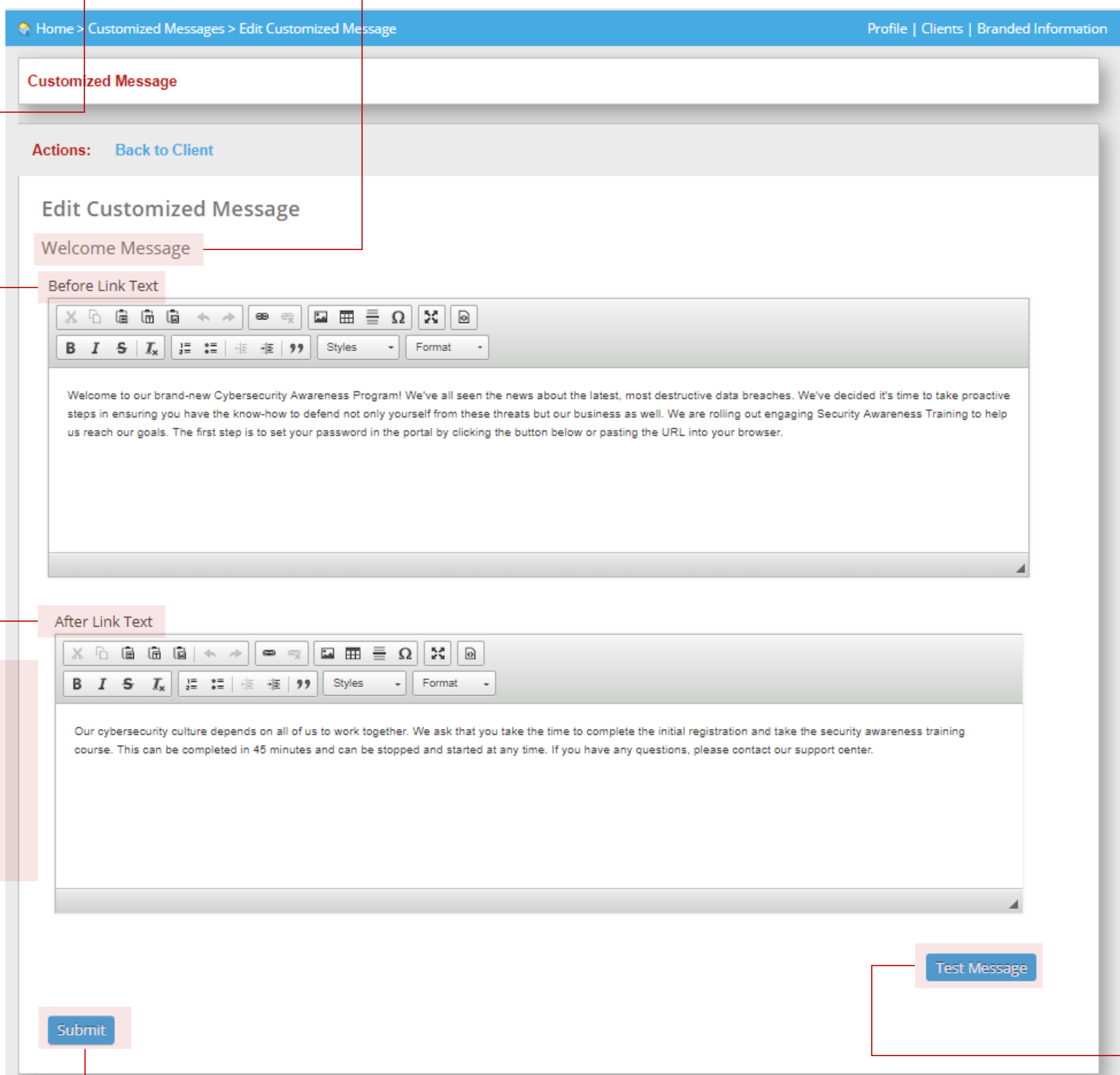
Customize messages and send test emails

Bulk Manage Users Step-by-Step Guide

Step 4: Customizing a message.

Text to show above the password reset link

Message type you're editing



Text to show below the password reset link

Submit to save your changes and return to the Bulk Manage Users screen

Send a test message to your email of choice

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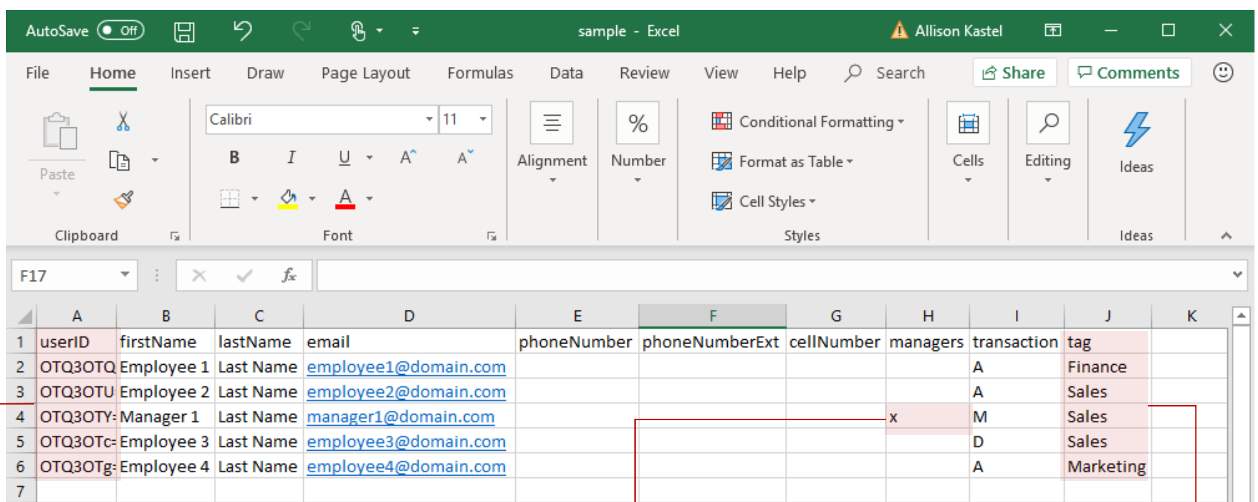
Step 5: Click “Download CSV Bulk Upload template” to download the current list of users inside the portal you’d like to modify. If you are uploading new users to the portal, a blank template will download.

Please Note:
Required Fields: firstName, lastName, email, transaction (**do not** change header names).
If the user will have a manager role, place an "X" in the manager column. Leave this field blank for employees.
Transaction column key: Used to manage user access

- A - Add or reactivate user (user will be notified)
- D - Deactivate user (user will not be notified)
- M - Modify user information (default for existing users)



	A	B	C	D	E	F	G	H	I	J	K
1	userID	firstName	lastName	email	phoneNumber	phoneNumberExt	cellNumber	managers	transaction	tag	
2	OTQ3OTQ	Employee 1	Last Name	employee1@domain.com					A	Finance	
3	OTQ3OTU	Employee 2	Last Name	employee2@domain.com					A	Sales	
4	OTQ3OTY:	Manager 1	Last Name	manager1@domain.com				x	M	Sales	
5	OTQ3OTc:	Employee 3	Last Name	employee3@domain.com					D	Sales	
6	OTQ3OTg:	Employee 4	Last Name	employee4@domain.com					A	Marketing	
7											

Do not edit this column. An encrypted unique identifier allows our system to recognize users already in our system.

Grant manager access by marking the column with an “x” for that user

This field isn’t required, but by using this field you will be able to send filtered phishing emails and have access to more detailed reporting based on department.

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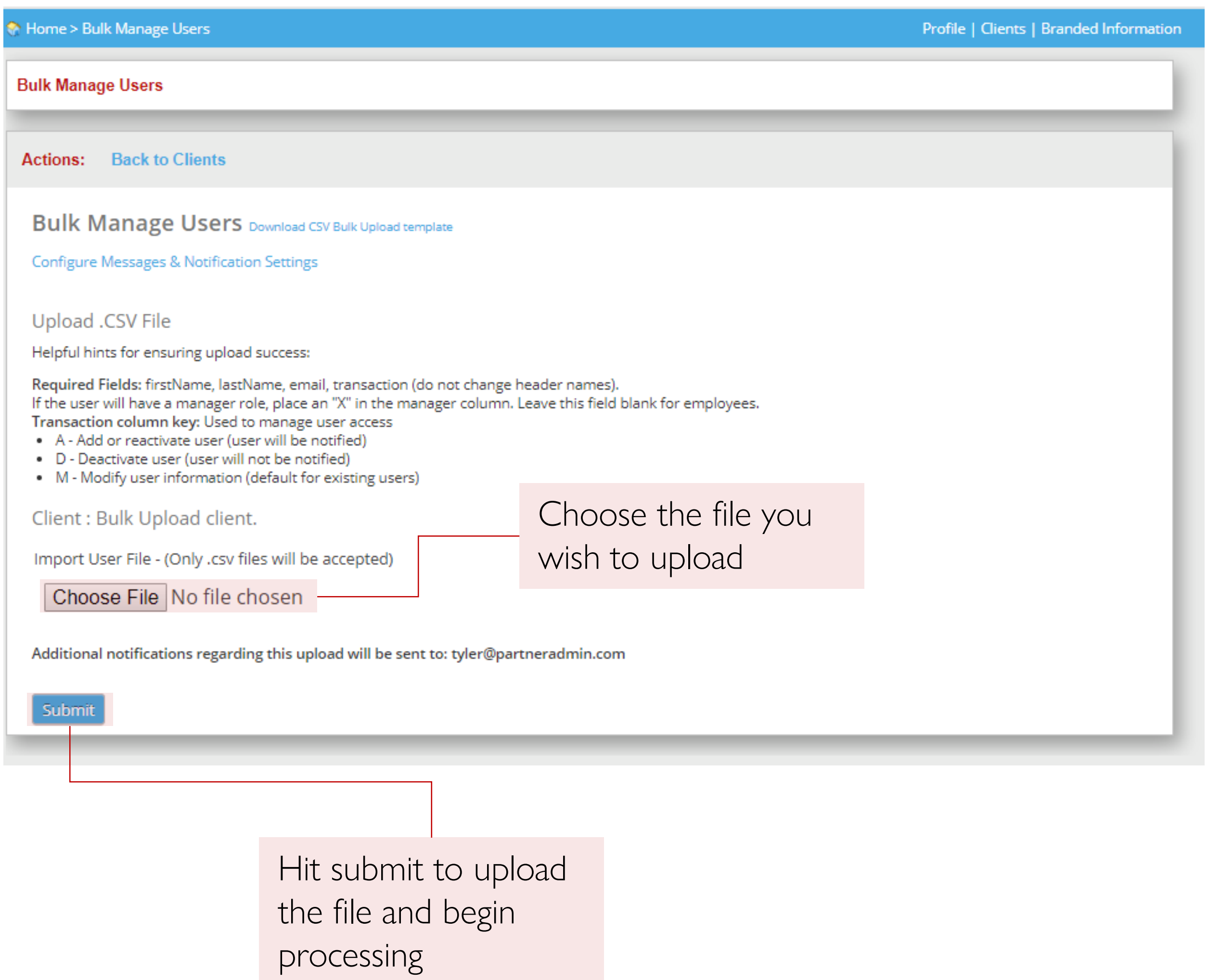
Step 6: Once your file is formatted correctly and ready for import, navigate back to your Bulk Manage Users page for the client you wish to edit and click the “Choose File” button. Select the file you would like to upload and hit “Open”.



* Please note that user uploads are processed every 15 minutes, so there may be a delay for your changes to show. You will receive notification regarding the success of this upload to the email you are currently logged in under in addition to the email address set under the “Configure Messages & Notification Settings”.

CONGRATULATIONS!

Your Bulk Upload is Complete

Repeat this process for each of your clients

Breach Secure Now!

Questions/Concerns?
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