GETTING STARTED

Please watch the video below for a full overview.

GOLDPHISH

IMPORTING LEARNERS

Adding new learners to the platform is super easy, and we've got a few options available depending on your preference.

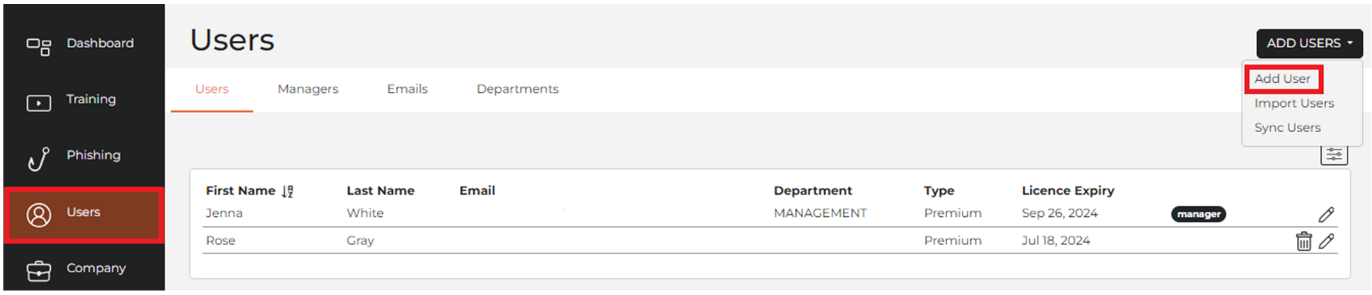
To get started importing your learners follow these easy steps:

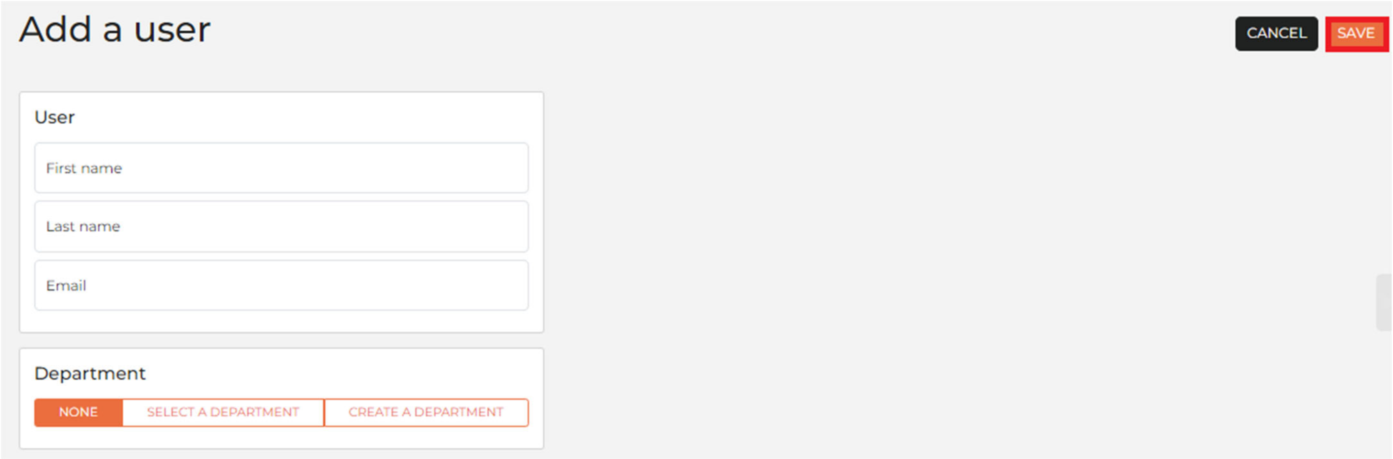
- Login and access your **'Admin dashboard'**
- Navigate to the '**Users**' section,
- Click on the '**Add Users**' button located top right corner. Managers will have the choice to:

How to Add Learners Manually:

To begin, follow these easy steps:

- Navigating to the '**Users**' section
- Click the '**Add Users**' button located in the top right corner
- Select '**Add User**'.
- Provide Information for the learner
- Click '**Save**'.





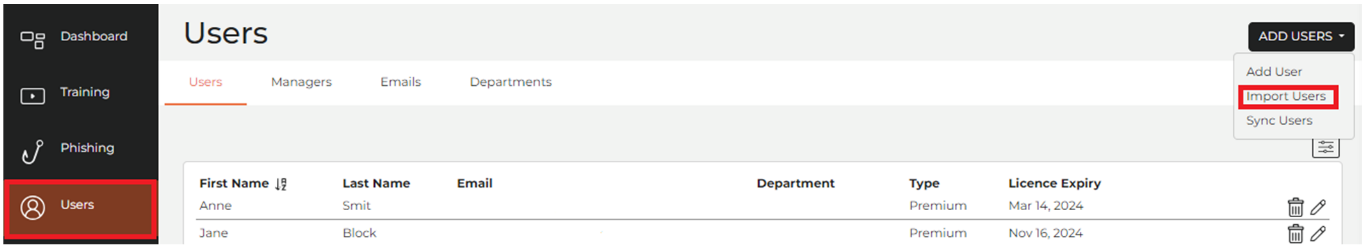
How To Import Learners via CSV

Here are the recommended fields to include in your CSV file:

1. First names of learners
2. Last names of learners
3. Company email addresses
4. Departments

To begin, follow these easy steps:

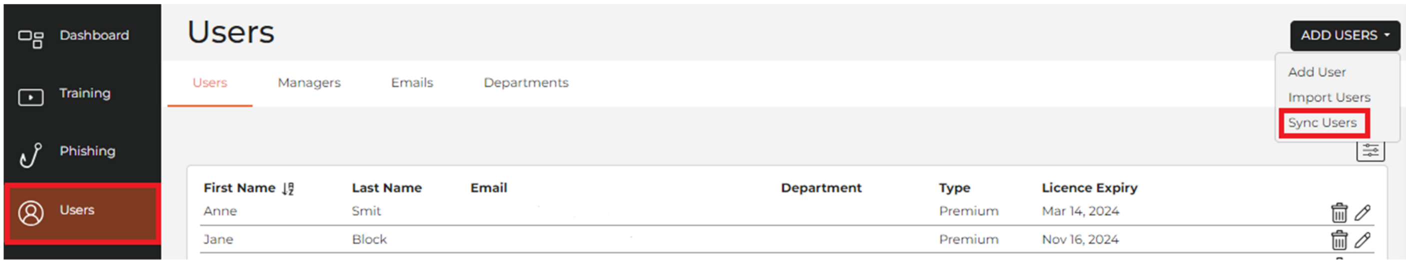
- Navigate to the **'Users'** section.
- Click **'Add Users'** button located in the top right corner.
- Select **'Import Users'**.
- Click **'Load Users From File'**.
- Choose your **CSV file** and click **'Complete Upload'**.



Syncing Learners by Active Directory

To begin, follow these easy steps:

- Navigate to the **'Users'** section.
- Click the **'Add Users'** button located in the top right corner.
- Select **'Sync Users'**.



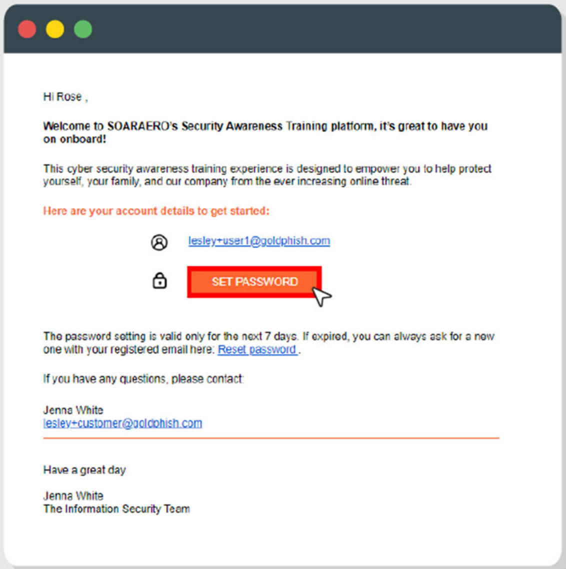
New Learner Onboarding Notifications

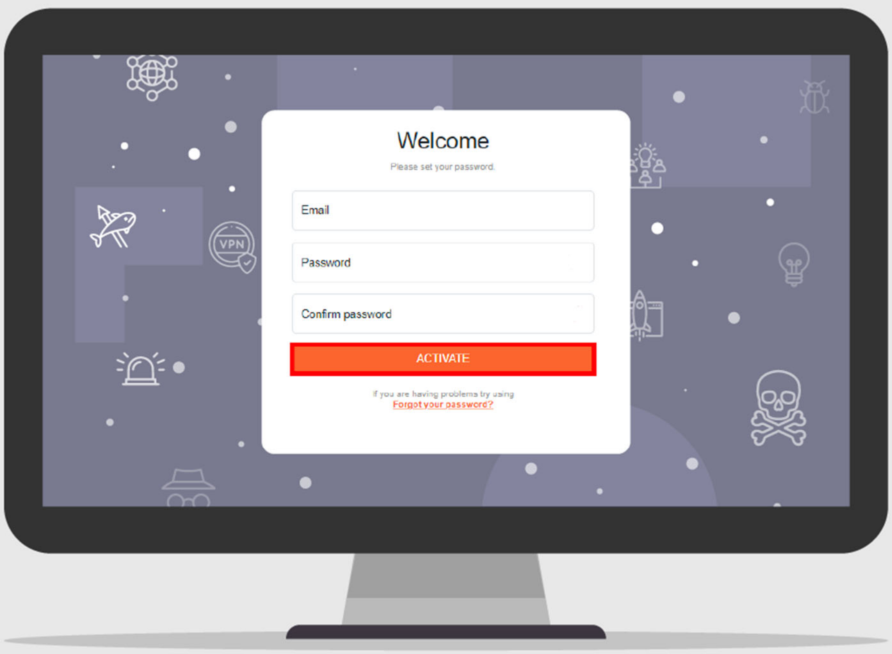
First-time learners on the platform will receive two emails to their mailboxes from app@goldphish.com.

1. The first is an automated onboarding welcome email, containing their **Username** and a '**Set password**' link (or "token") to the platform to get started with their training program.

GETTING STARTED

2. The second is a **'New Training Notification'** email that notifies the learner that new training has been assigned to them by their manager.





GOLDPHISH

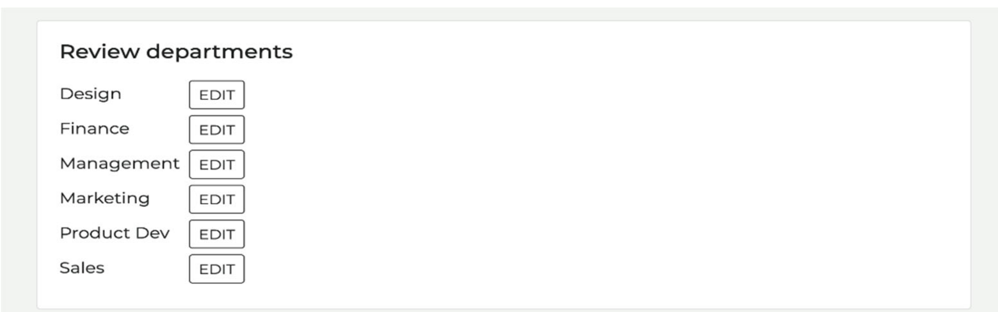
CREATING DEPARTMENTS

How To Create Departments:

Managers will have the choice to:

1. **Include department names on the CSV file:**

- Our handy import tool will automatically create the departments for you when importing learners.
- Check the spelling of department names is accurate.
- Select **'Complete Upload'** to finalise the process.



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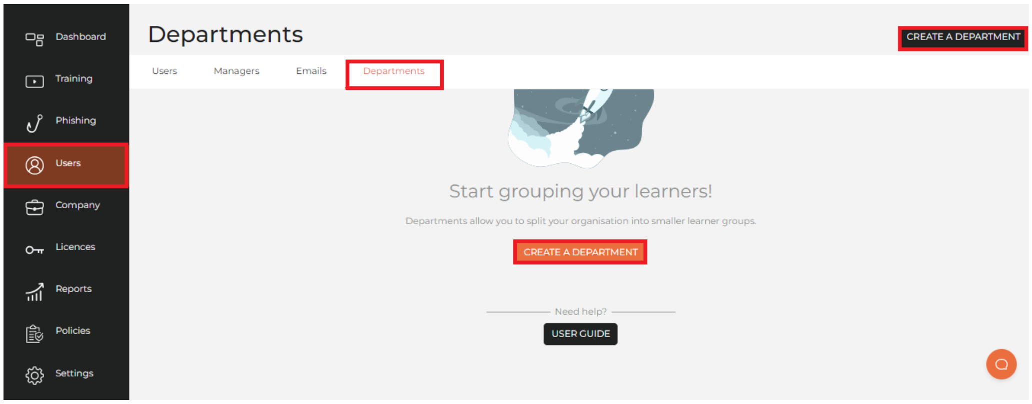
2. **Manual Department Creation:**

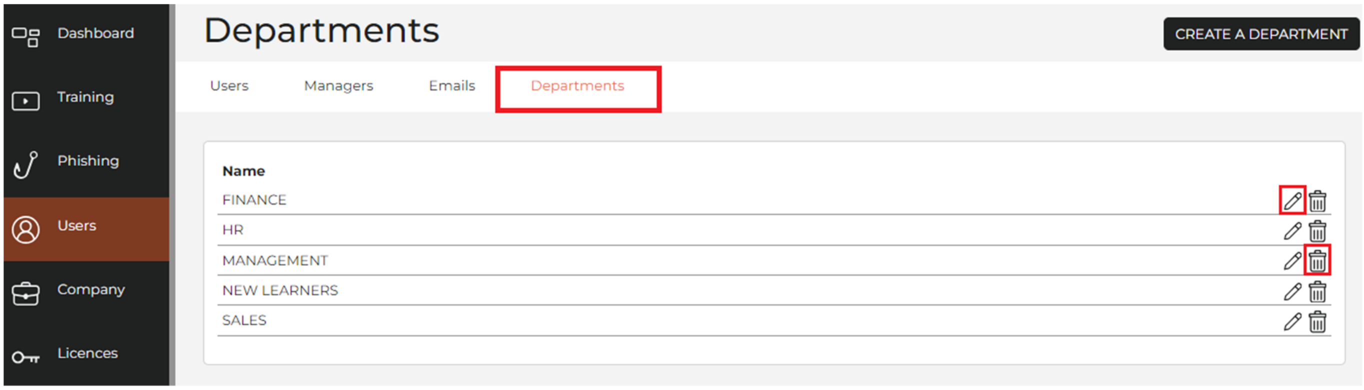
- Navigate to the **'User'** section.
- Select the **'Departments'** tab.
- Click the **'Create a Department'** button in the top right.



- Name the Department
- Click ' **Save'**

How To Edit Departments:

- Navigate to the **'User'** section.
- Select the **'Departments'** tab.
- Locate the Department
- Click the **'Pencil'** icon to 'Edit' and **'Save'.**
- Click on the **'Bin'** icon if you wish to **'Delete'** a department.

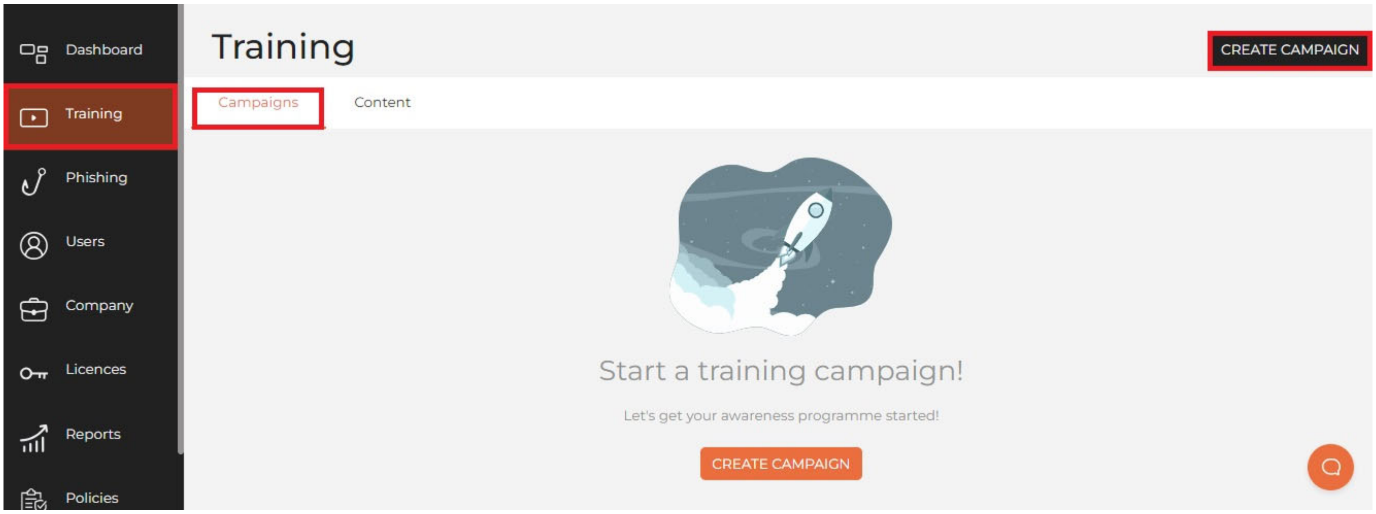

Dashboard
Training
Phishing
Users
Company
Licences
Departments
CREATE A DEPARTMENT
Users
Managers
Emails
Departments
Name
FINANCE
HR
MANAGEMENT
NEW LEARNERS
SALES

How to Create a Training Campaign

Follow these five simple steps to get started:

Step 1. Create Campaign

- Login into your Admin dashboard.
- Navigate to the **'Training'** section.
- Select the top **'Campaigns'** tab
- Click **'Create Campaign'.**

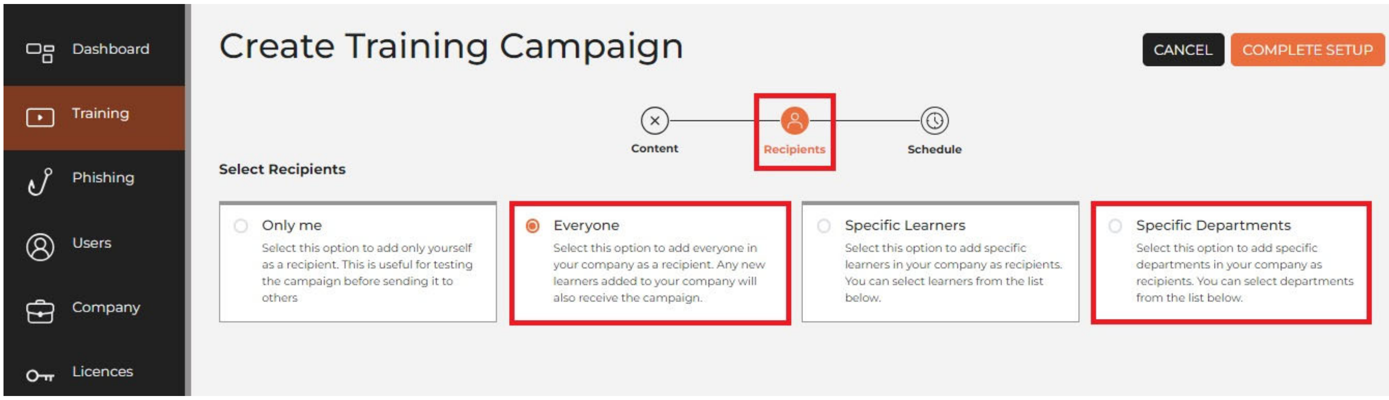


Step 2. Select the Training Content

- Choose training content to include in your campaign, such as interactive eLearning **'Modules'** and short animation **'Videos'**.
- Navigate to the **'Template'** card and click on the ellipsis menu **('3 dots').**
- **'Preview'** the available training content before making your selection.
- Click **'Select'**.

Step 3. Choose your Recipients

- Choose to Target **'Everyone'**, **'Specific Departments'**, or **'Specific Learners'**.

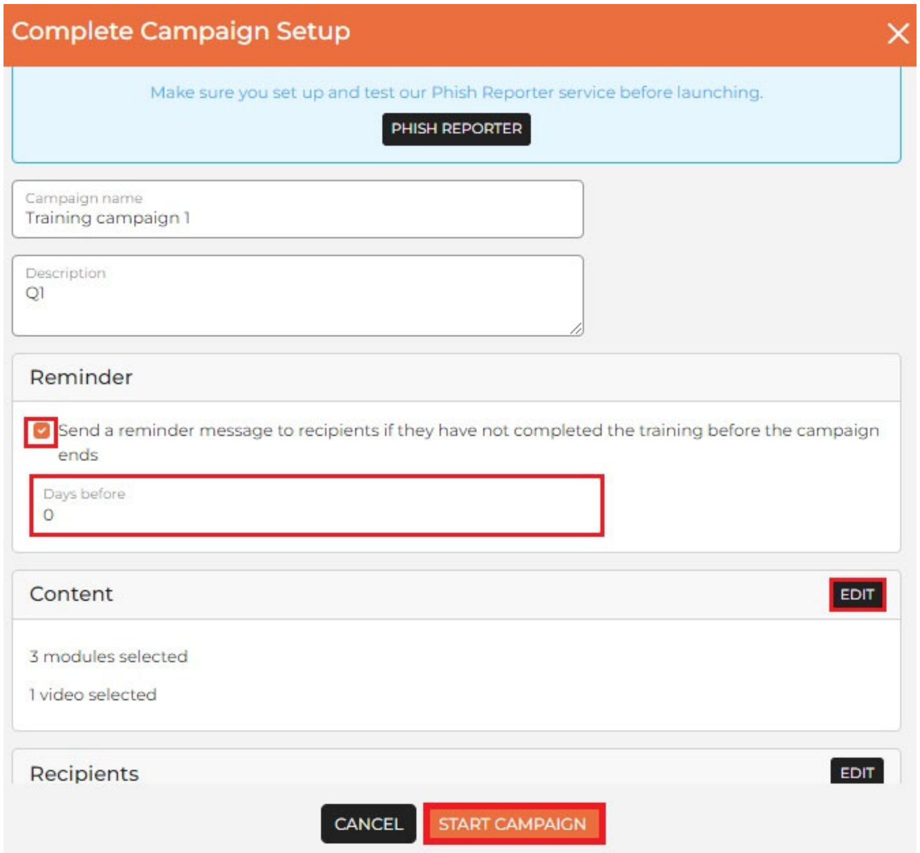


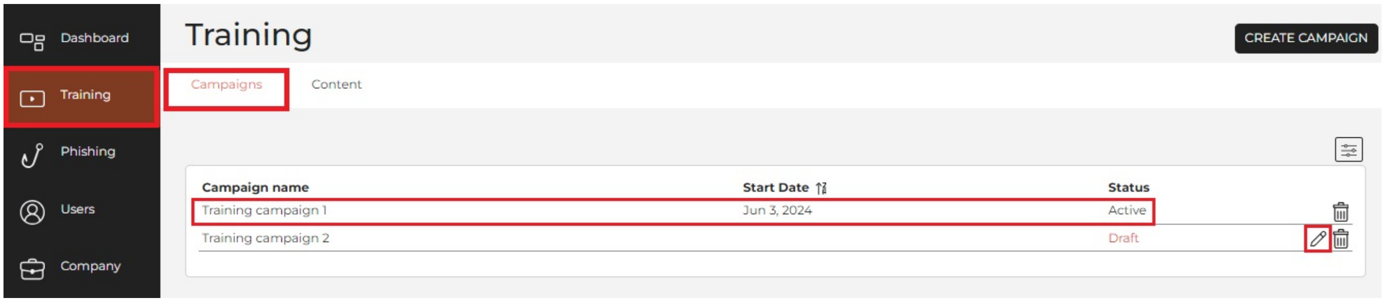
Step 4. Set a Schedule

- Click the **'Calendar'** icon icon to select the campaign start date.
- Set the campaign **'Duration'** and use the dropdown menu to customise according to your preferences.

Step 5. Complete Setup

- Select the **'Complete Setup'** button.
- Populate the **'Campaign Name'** block field.
- Populate the **'Description block'** field.
- Click the **'Reminder**' check box for learners yet to complete their training.
- Click **'Start Campaign'** to launch.



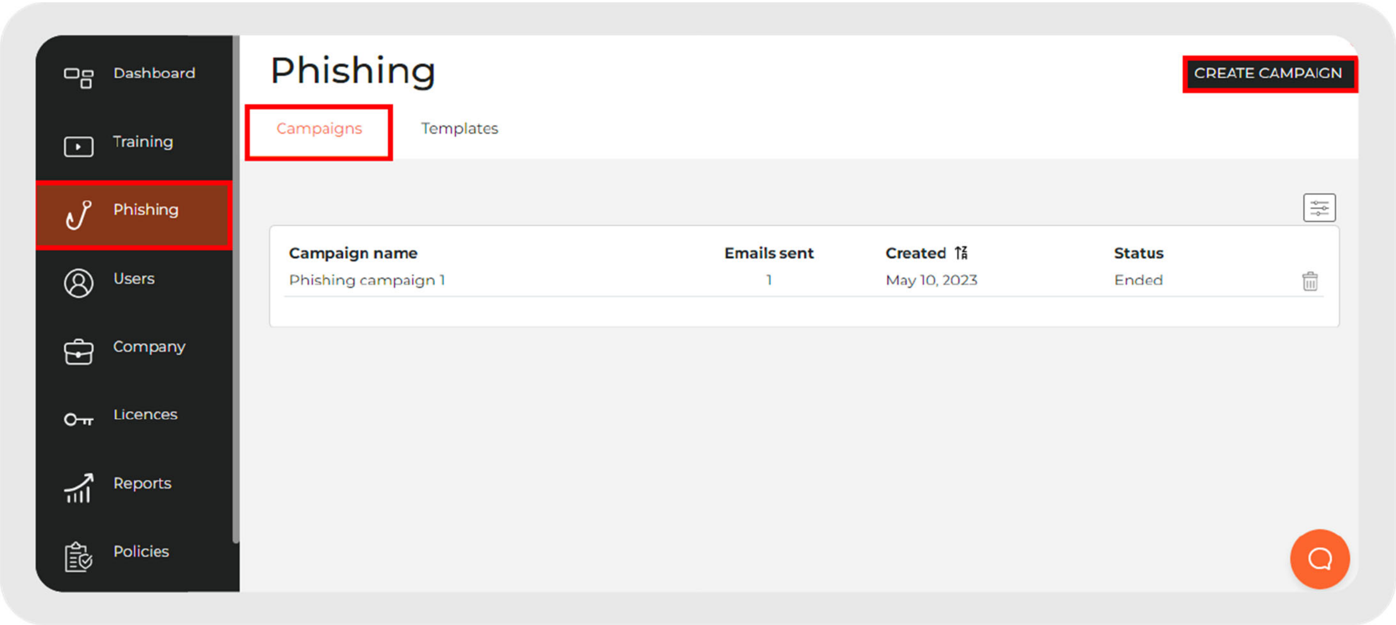


How to Create a Phishing Campaign

Follow these five simple steps to get started:

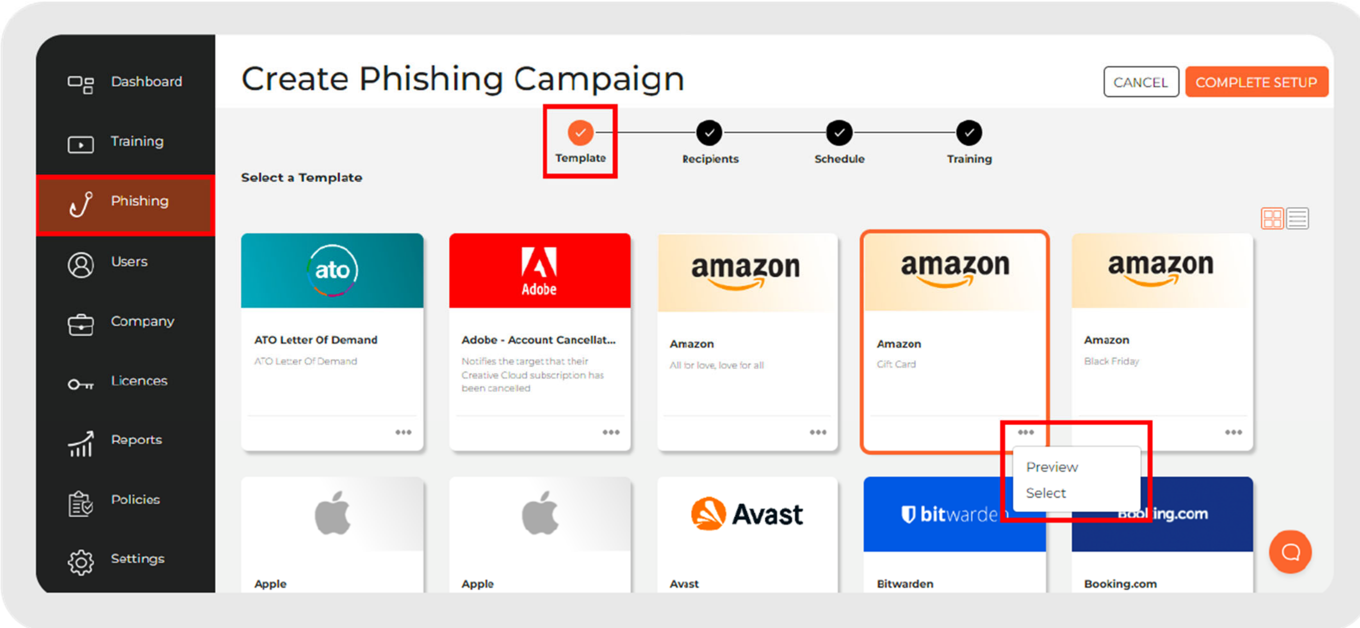
Step 1. Create Campaign

- Login into your Admin dashboard.
- Navigate to the **'Phishing'** section.
- Click **'Create Campaign'**.



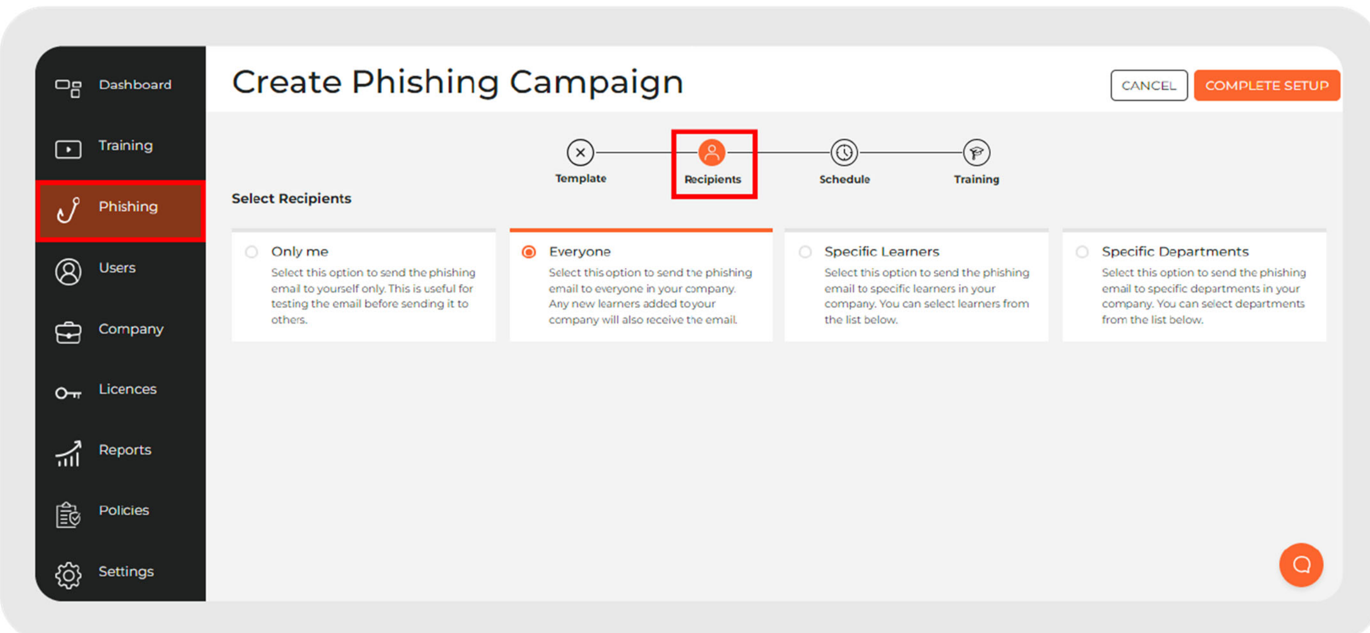
Step 2. Select a Template

- Choose from various email templates, including click-only experiences or spoof landing pages.
- Choose the **'Templates'** tab.
- Navigate to the template card, and click on the ellipsis menu **('3 dots').**
- **'Preview'** the templates before making your selection.
- Click the **'Select'** option.



Step 3. Choose your Recipients

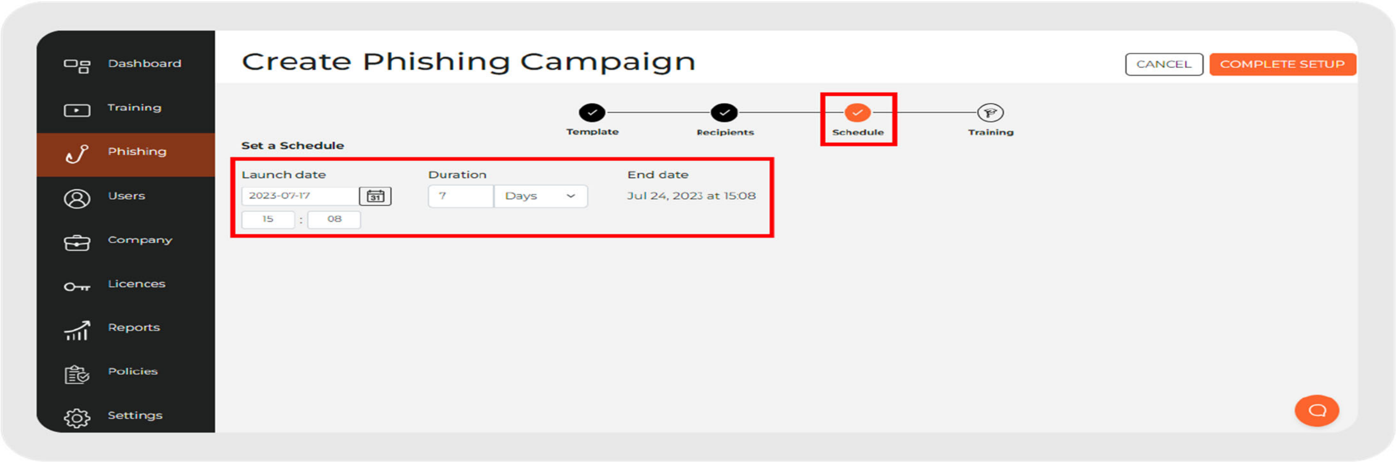
- Choose to Target **'Everyone'**, **'Specific Departments'**, or **'Specific Learners'**.



Step 3. Set a Schedule

- Click the **'Calendar'** icon icon to select the campaign start date.

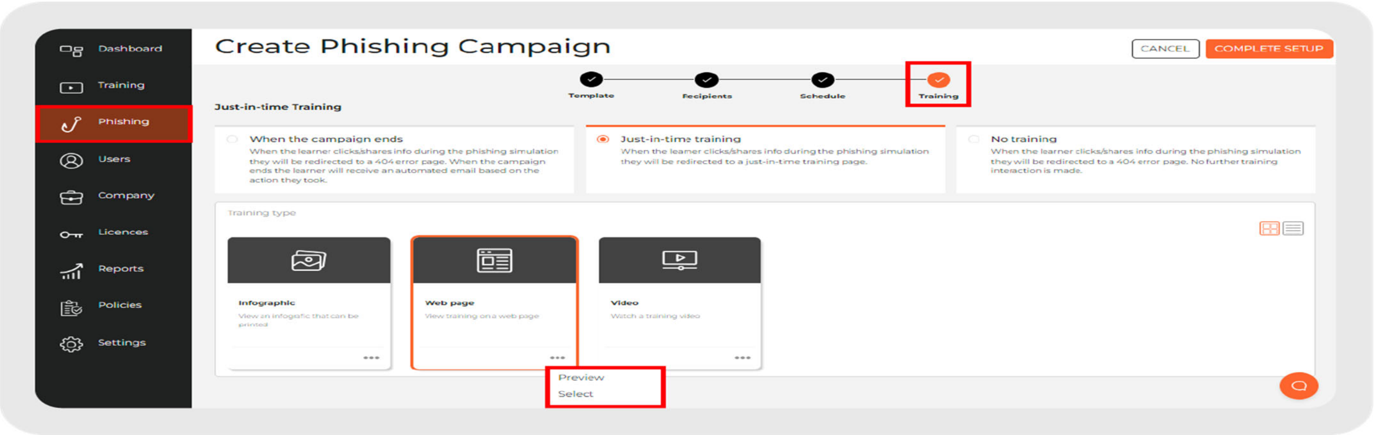
- Set the campaign '**Duration'** and use the dropdown menu to customise according to your preferences.



Step 4. Select Training Type

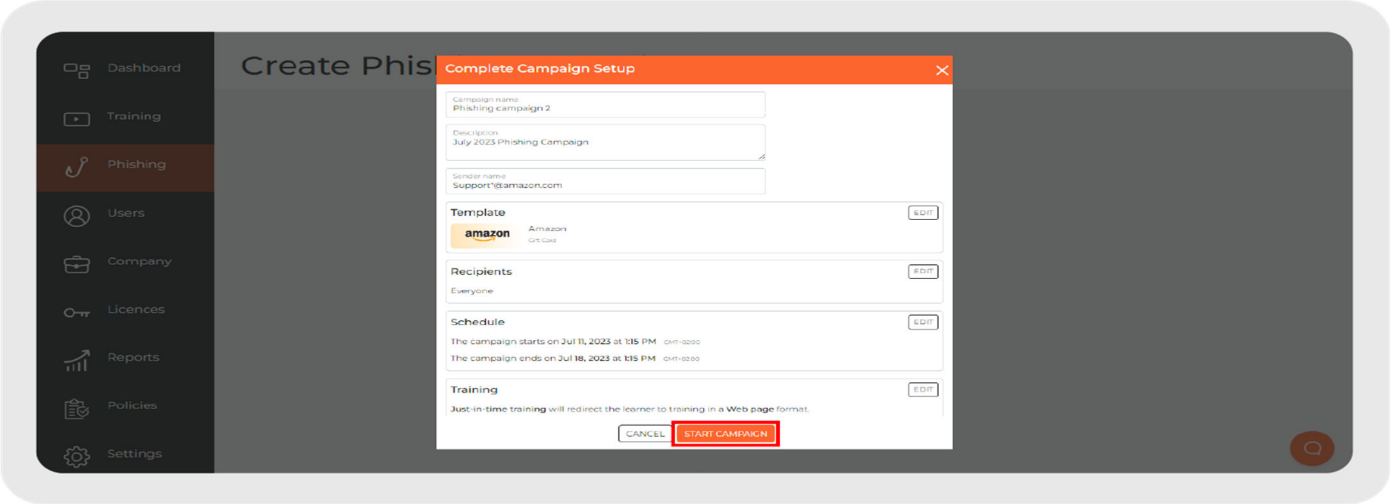
- Decide when learners should be notified about the phishing attack.
- Choose from different Training Types based on learner responses.

1. **When the campaign ends**: When the learner clicks/shares info during the phishing simulation they will be redirected to a 404 error page. When the campaign ends the learner will receive an automated email based on their action.
2. **Just-in-Time Training**: When the learner clicks/shares information during the phishing simulation, they will be redirected to a just-in-time training page.
3. **No notification**: *When the learner clicks/shares information during the phishing simulation they will be redirected to a 404 error page*. No further training interaction is made.



Step 5. Complete Setup

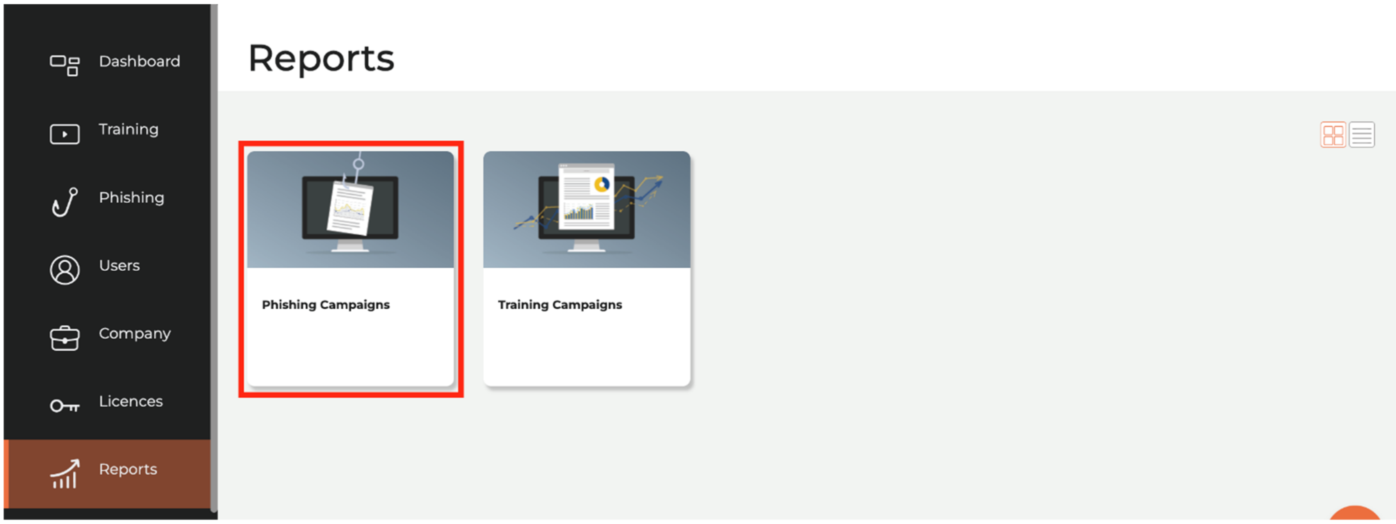
- Select the **'Complete Setup'** button
- Populate the **'Campaign Name'** block field
- Populate **'Description block'** field
- Create a spoofed '**Sender Name'**. This will change the name displayed in the recipient's mailbox, but it will not change the actual sender's email address or domain.
- Click **'Start Campaign'** to launch.



Reporting

Managers can produce and download reports detailing the progress, scoring and outcomes of phishing and training campaigns.

- You can choose between a data-rich CSV report and an executive summary style PDF report for your campaign.
- Reports can be produced for individual campaigns or multiple campaigns.

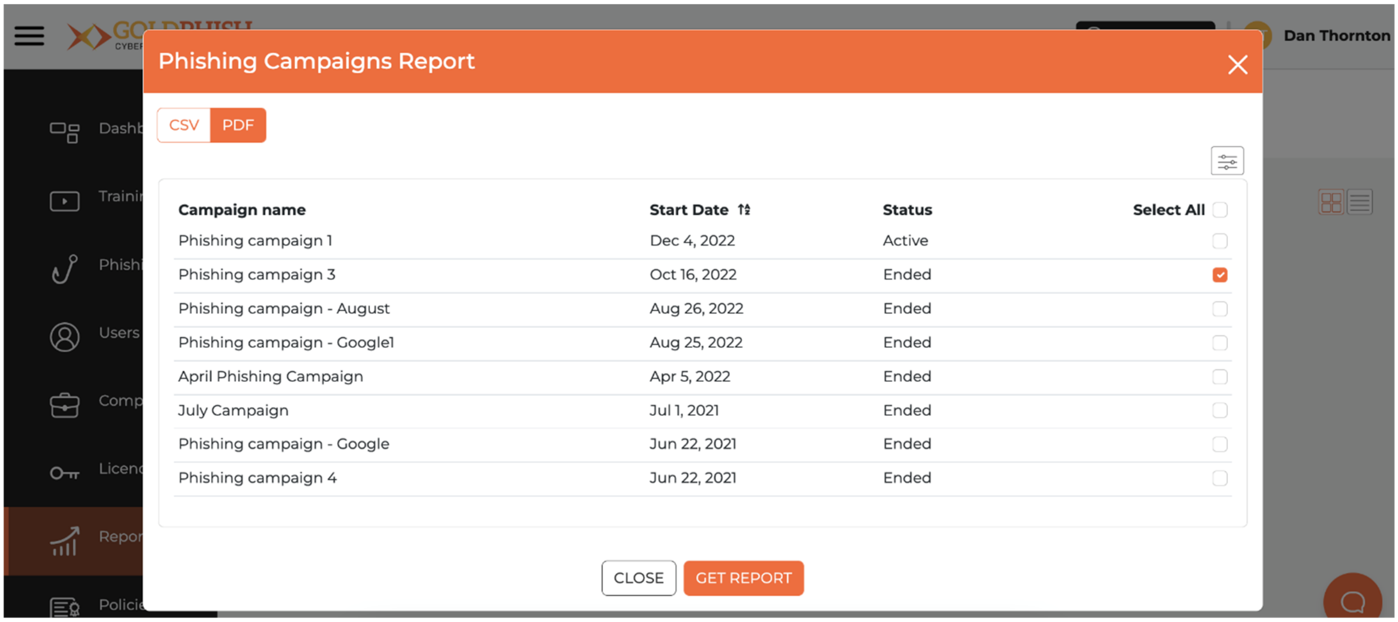


1. Navigate to the Reports section on the platform, and select **Phishing Campaigns** or **Training Campaigns**.

2. Choose the type of report: **CSV** or **PDF**.

3. Select on the right hand column which campaign you want to create the report for: **Individual**, **Multiple**, or **All** campaigns.

4. Click the **Get Report** button at the bottom.



Alternatively, Managers can download campaign reports directly from the specific campaign dashboard by clicking on the '**Reports**' button in the top-right corner and selecting either '**CSV**' or '**PDF**' from the drop down.