Onboarding checklist

The onboarding checklist outlines the tasks you must complete when adding an SMB organization, prior to launching any phishing or training campaigns. These *required tasks* should be completed in the order listed.

The checklist also lists *recommended tasks* that, while optional, can enhance overall operation and improve the user experience.

Each task includes a link to additional information.

IMPORTANT  The required tasks must be completed for every SMB organization that is added.

Organization Name:

Required tasks

| Required Tasks | |
| --- | --- |
|  | [Configure KaseyaOne Unified Login:](https://help.bullphishid.kaseya.com/help/Content/02_Configuring_login_and_user_settings/02_Enabling_Kaseyaone_Unified_Login_for_your_BullPhish_ID_Organization.html) This will allow your end users to securely authenticate with multiple modules by using just one set of credentials. |
|  | [Safelist the BullPhish ID IP addresses and domains:](https://help.bullphishid.kaseya.com/help/Content/12_Safelisting_guides/Safelisting_guides.htm) To ensure campaign emails are delivered to the intended recipients, you must safelist the BullPhish ID IP addresses and domains in the SMB organization's email delivery platform.  Access and follow the steps in the [safelisting guide](https://help.bullphishid.kaseya.com/help/Content/12_Safelisting_guides/Safelisting_guides.htm" \t "_blank) for the client's email delivery platform.  c If the client is using Microsoft Exchange, enable [Enhanced Filtering for Connectors in Microsoft Exchange](https://help.bullphishid.kaseya.com/help/Content/12_Safelisting_guides/Resolving_SMTP_relay_issues.htm). |
|  | [Create an SMB organization:](https://help.bullphishid.kaseya.com/help/Content/03_Creating_an_SMB/01_Creating_an_SMB.htm) To manage BullPhish ID tasks for an SMB organization, you need to create the organization in BullPhish ID. |
|  | [Add targets](https://help.bullphishid.kaseya.com/help/Content/04_Working_with_targets_&_groups/01_Adding_editing_targets.htm): Before you can conduct a phishing or training campaign, you have to add your employees, known as targets, to BullPhish ID. |
|  | [Add targets to a group:](https://help.bullphishid.kaseya.com/help/Content/04_Working_with_targets_&_groups/02_Creating_a_group.htm) After adding targets to BullPhish ID, they must be assigned to a group. |

Recommended Tasks

| Recommended Tasks | |
| --- | --- |
|  | [Integrate with Graphus:](https://help.bullphishid.kaseya.com/help/Content/11_Integrations/bullphish-id-integration-with-graphus.html) Graphus integration eliminates the need for whitelisting and ensure 100% campaign deliverability to your end users. |
|  | [Add a partner user:](https://help.bullphishid.kaseya.com/help/Content/01_Getting_started_with_BullPhish%20ID/05_Adding_a_partner_user.htm) The partner user account type you select determines the partner-level and SMB level permissions granted to the user. |
|  | [Add an SMB user:](https://help.bullphishid.kaseya.com/help/Content/03_Creating_an_SMB/02_Adding_an_SMB_user.htm) The SMB user account type you select determines the SMB level permissions granted to the user. |
|  | [Configure a custom domain:](https://help.bullphishid.kaseya.com/help/Content/08_Configuring_campaign_settings/Configuring_a_custom_domain.html) You can configure a custom domain that is available to all of your SMB organizations or configure a custom domain for a specific SMB. |
|  | [Create a sending profile:](https://help.bullphishid.kaseya.com/help/Content/08_Configuring_campaign_settings/Creating_sending_profile.html) A sending profile defines the email address that appears in the From field of the recipient's email. |
|  | [Create a custom email template:](https://help.bullphishid.kaseya.com/help/Content/08_Configuring_campaign_settings/Creating_a_custom_email_template.html) You can create custom phishing and training email templates on which campaign emails will be based. |
|  | [Setup Global training email reminders:](https://help.bullphishid.kaseya.com/help/Content/07_Creating_a_training_campaign/10_Enabling_training_reminders_feature.htm) Send email reminders automatically to users who have not yet completed their scheduled training courses. |
|  | [Customize your training portal:](https://help.bullphishid.kaseya.com/help/Content/08_Configuring_campaign_settings/Setting_up_a_custom_training_portal.html) Enhance the user experience by customizing your organization's training portal. |