

# ComplianceSuite™ ASP Quick Start

Follow these steps for a customer deployment once subscription is fulfilled and provisioned.

Each tool or service provides various layers of security. Depending on the license purchased, not all steps apply.

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## PC Encryption & Access Controls

**Goto:** <https://boldd-us.beachheadsolutions.net/smbsecure>

- > Login using your ASP credentials.
- > Click: Installers.
- > Select the customer tenant account from the dropdown.
- > Download the **Standard Installer MSI** and install on PC.
- # For BitLocker Passcode we suggest User's Cell Number.
- # Needs Windows Pro and Above (Not Windows Home/SUL)
- # Implement the Exclusions in AV/EDR. [List is HERE.](#)
- > Install a MS/Google 2FA App on User's Mobile.

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## Risk Assessment

**Goto:** <https://portal.telivy.com>

- > Login using your ASP credentials. Invite your Admins.
- > Click: Assessments.
- > Select the customer assessment.
- > Click on the Setup button on the left.
- > Navigate to Deploy Agent -> Instructions. (Windows/Mac)
- > Download the Agent Installer EXE and install on PC.
- > Click on **Monitor** button to enable ongoing monitoring.
- # Allow Telivy URL and whitelist [processes](#) in AV/EDR.

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## Awareness Training & Exposed Data

**Goto:** <https://app.prventi.com>

- > Login using your ASP credentials. Invite your Admins.
- > Click: Client Organisations, search Org & click Manage.
- > Click: Learners.
- > Add Learners and invite them to the platform.
- > Click: Reports.
- > Setup scheduled reports for the customer as required.
- # Add \*@[mailer.prventi.com](mailto:mailer.prventi.com) to their trusted email list.

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## PDF Email Encryption & Check4Phish

**Goto:** <https://smbsecure.co.za/emailencryptionsoftware>

- > Click: Download Installer for the correct Outlook bitness.
- > Close Outlook on PC and Run the MSI Installer.
- > Run batch script to prevent Outlook disabling this Addin.
- > Open the Addin in Outlook and Apply License.
- # License will be in Description of Account on portal.
- # Only works in Classic Outlook on Windows on PC only.
- # Use the *User Installer* to allow self-upgrades by User.

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## SendGuard 365 Lite

1. Open Outlook on PC or Admin Centre. Click on All Apps.
2. Search SendGuard and Install the Addin from MS Apps.

**Goto:** <https://standsssaas.azurewebsites.net>

- > Login using your ASP credentials.
- > Search Customer Name.
- > Click: Manage.
- # Customer must be using a M365 domain to use SG.

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## Compliance Toolkits

**Goto:** <https://compliancekate.com>

- > Login using license info provided (*to test access*).
- > Send URL and License info to customer.
- > Guide your customer through their compliance journey.
- # License will be in Description of Account on the portal.
- # Customer must store all documentation locally.

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## Managed DMARC & MTA-STX

Await contact from **SMBsecure™ DMARC Service Team**

- > Add DNS Records as instructed.
- > Monitor and tune as instructed.
- # Email [dmarcservice@smbsecure.co.za](mailto:dmarcservice@smbsecure.co.za) for assistance.
- # Policy finalisation period is typically 2-4 weeks.
- # Advise any changes to SPF for "Allowed" email senders.

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## Cyber Warranty (South Africa ONLY)

Await a copy of the **SMBsecure™ Warranty Booklet**

- > Check details are correct on Warranty Booklet and file it.
- > Send copy of Warranty Booklet to customer.
- > Print and complete the checklist for warranty validation.
- # Cyber Warranty is void for excluded industries.
- # Claims must be lodged within **7 day** of a cyber event.

For all assistance email [ASPsupport@smbsecure.co.za](mailto:ASPsupport@smbsecure.co.za)