

# 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.

1

## PC Encryption & Access Controls

**Goto:** <https://bold-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.

2

## 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 EKE and install on PC.
- > Click on **Monitor** button to enable ongoing monitoring.
- # Allow Telivy URL and whitelist [processes](#) in AV/EDR.

3

## 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.

4

## 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.

5

## 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.

6

## 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.

7

## 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.

8

## 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)

# ComplianceSuite™ Order Quick Start

Follow these steps for any New License Orders and for any Subscription Change Requests.

**ASP Order URL:**

<https://smbsecure.co.za/orderform>

SMBsecure

## ComplianceSuite Take-On & Change Request

Disclaimer: Any wrong details provided on this form will result in incorrect order processing. Please check all details before submitting.

### Action Type \*

Options will appear dependant on the action you require

NEW

### Region for End-Customer \*

South Africa

### ComplianceSuite Options - South Africa \*

Check your Ratecard for descriptions and inclusions.

If you do not have a rate card please Click Here

SMBsecure™ ComplianceSuite SME

### Bundle Pack Size \*

5

### Partner Trading Name (Your ASP Name) \*

Your Company Name (The company name you have submitted as an ASP)

### Your Name and Surname \*

Order Submitter Name and Surname

### Your Email Address \*

Order Submitter Email Address

### Your Contact Number \*

Order Submitter Contact Number

+27

### End-Customer Name \*

Company that will be using the licenses - Your Customer

### Customer Industry \*

### Subscription Start Date \*

Date that you would like the licenses to be assigned (Default is set to today's date)  
NOTE: Full month billing only. Licenses are not billed pro-rata.

yyyy/mm/dd

### Customer Domain \*

### What Antivirus /EDR is in use?

Required for Risk Assessment on NEW ORDERS

### Do you Require Managed DMARC for this Customer? (It is included)

Yes  No

### Customer Company Registration Number \*

Required for Warranty Registration

### Customer VAT Number (if they have one)

If they are VAT Registered

### Warranty Holder Name \*

Primary Contact at Customer

### Warranty Holder Email Address

Primary Contact Email Address at Customer

### Warranty Contact Number \*

+27

### Industry Exclusions \*

I / we confirm that the customer is not a

State owned entity

Municipality

Parastatal

Utility service provider

Gaming and gambling organisation (including online)

Adult media and adult entertainment organisation

Organisations participating in illegal and illicit activities

Submit

1

## Select Order Type / Options

> Select the Type of Bundle or Changes being ordered:

2

## Your ASP Details (Not Customer Details)

> Complete your ASP Partner details for this section.

3

## Your End Customer's Details

> Complete your customer's details for this section.  
> Specify the start date for the license & billing.  
> Can be a future date. No pro-rata. **Full month billing only.**

4

## Managed DMARC

> Specify if Managed DMARC is required for the customer if it's included with the selected ComplianceSuite Bundle.

5

## Cyber Warranty Details for SA Customers

> Specify the End Customer information required for the Cyber Warranty registration.  
> **This section will not appear for non-SA customers.**

6

## Submit Order

> Check all details before ordering.  
> Press **Submit** when done.

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