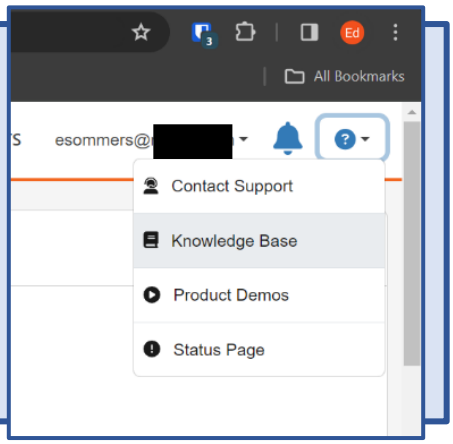
KnowBe4 Basics | Creating a Phishing Test Campaign

Before creating a phishing test campaign, be sure to complete the *Preparing for Annual Training Campaigns and Phishing Tests* (separate document) steps.

Usually, you'll create a year's phishing test campaigns around November or December.

If you need more general information about any of the steps described in this document, go to the KnowBe4 Knowledge Base. Click the Information button in the top right of the screen, then select Knowledge Base from the dropdown button. At the screen displayed, click:

- **Conduct Training Campaigns >**
- **Training Campaigns >**
- **Training Campaigns Guide (link)**
- **Creating a Training Campaign (link)**

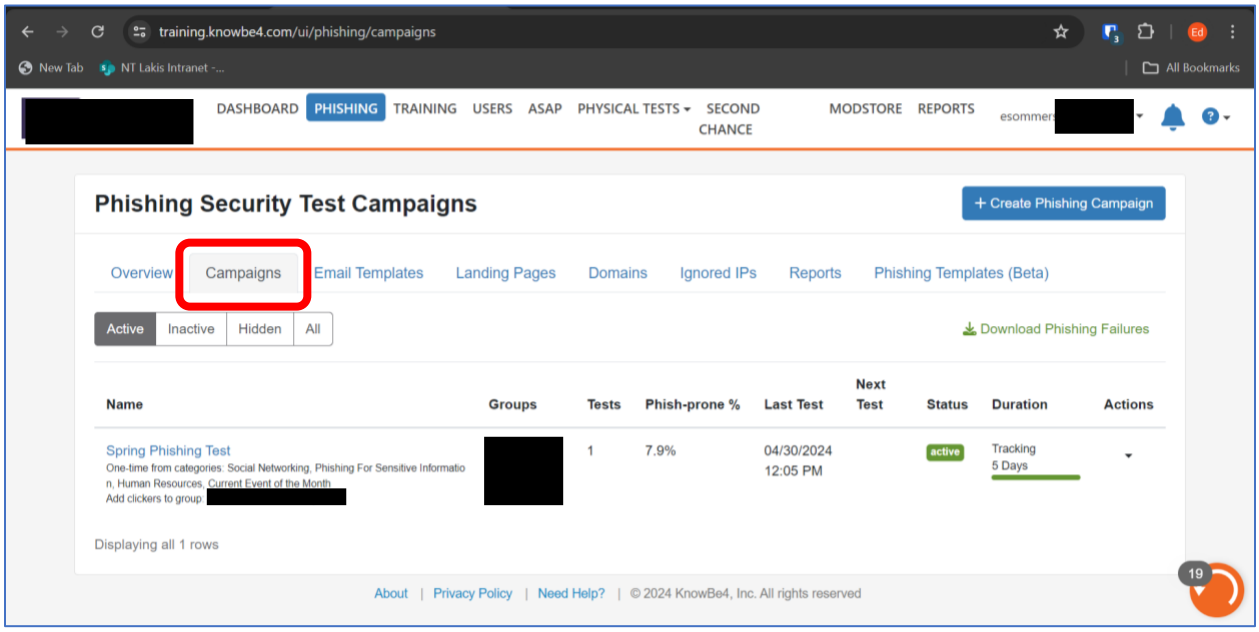


Creating a Phishing Test Campaign

Start by logging in to the KnowBe4 portal.

Once you enter the portal, click the **Phishing** tab.

The screen that displays is the **Overview** screen (similar to the one below). Select the **Campaigns** tab under the screen title. The Active box is selected by default and lists campaigns that are currently active.



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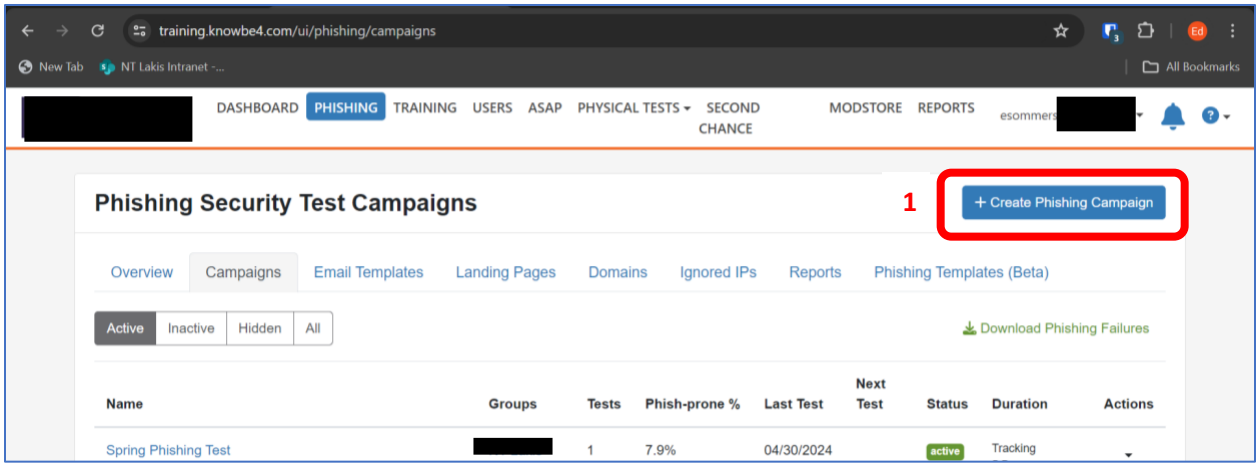
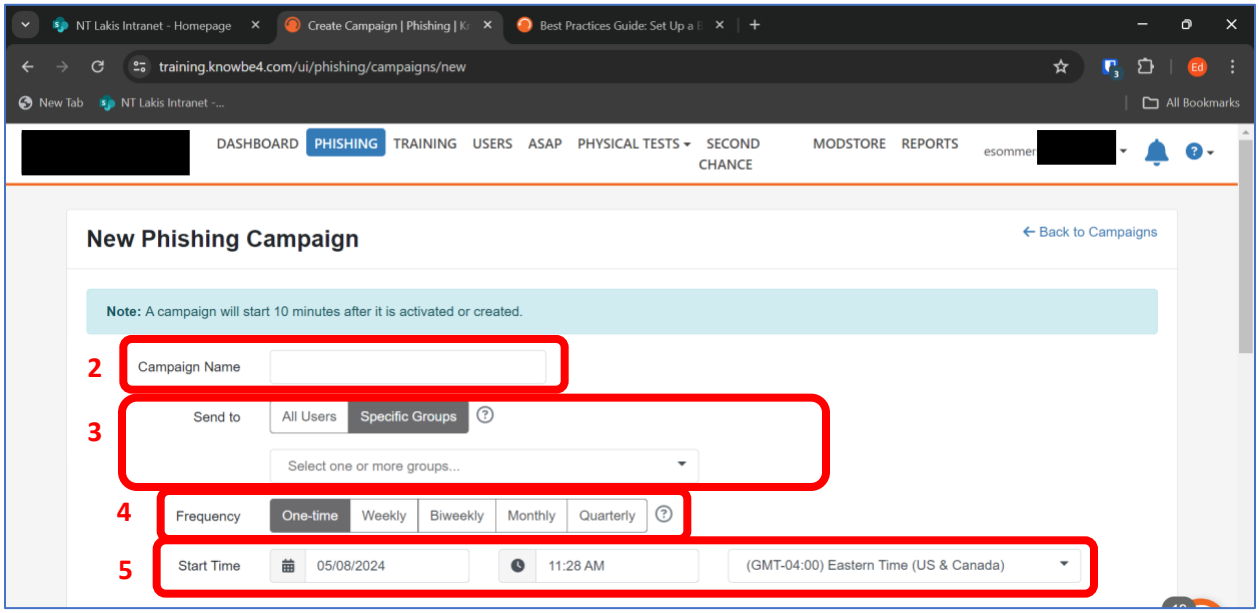


1. Click the blue + **Create Phishing Campaign** button in the top right corner of the screen. The **Create New Phishing Campaign** screen displays (similar to the one below).



2. Enter a **Campaign Name**. Name your campaign something descriptive, such as "Spring Phishing Test." Naming them by the season is a logical naming convention.
3. **Send to.** Make sure that "Specific Groups" is shaded, which indicates that you want selected groups within the Firm to receive the test. Select the " Clickers Group," the "Clickers Group," or the " Clickers Group." During the year, you should test each group within the eco-system once.
4. **Frequency.** Generally this will be "One time."
5. **Start Date.** Set the time and date this campaign should start.

Scroll down.

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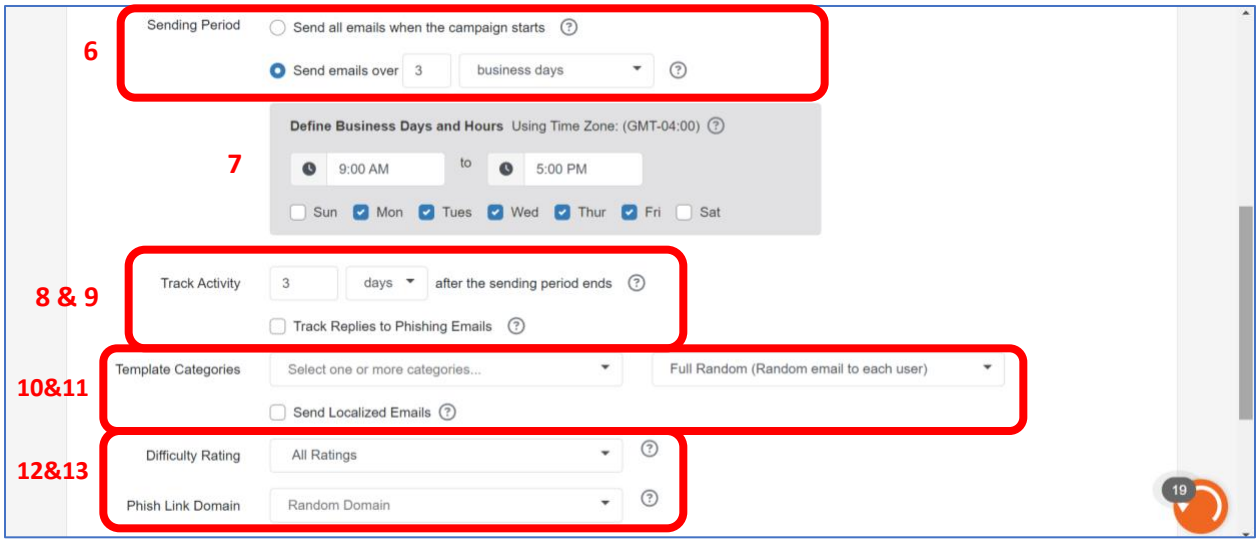

6. **Sending Period.** Select the button "Send emails over" button and then select "3" and "business days." This will send emails to staff over a period of three business days (rather than all at one time, which looks rather obvious).
7. **Define Business Days and Hours.** Generally, we define business days as 9 a.m. to 5 p.m. Monday through Friday. So, these fields should reflect that.
8. **Track Activity.** Select "3" and then select "days" from the dropdown menu.
9. **Track Replies to Phishing Emails.** Leave this box unchecked.
10. **Template Categories.** There are several different templates to select from. Each test you schedule can use different types of templates. Select 3 or 4 templates for each test so the test group doesn't all receive the same email. Common templates for us include:
    a. Current Event
    b. Current Event of the Month
    c. QR Code
    d. Human Resources
    e. IT
    f. Sensitive Information
    g. Online Services
    h. Social Networking
    i. Holiday
    j. Legal Industry (use with Clickers Group)

    Then, from the second box, select "Full Random" from the dropdown list.

11. **Send Localized Emails.** Again, leave the box unchecked.
12. **Difficulty Rating.** Choose the difficulty rating for the test. Depending on the Template Catories you select, you can adjust the difficulty to the test. For example, most staff should be familiar (because of previously assigned training) with Human Resources, Social Engineering, and QR Code emails by now, so you may want to make a test with those templates more difficult. Categories that staff have less experience with (or little training courses about) can have an easier rating.
13. **Phish Link Domain.** Set this to **Random Domain**.

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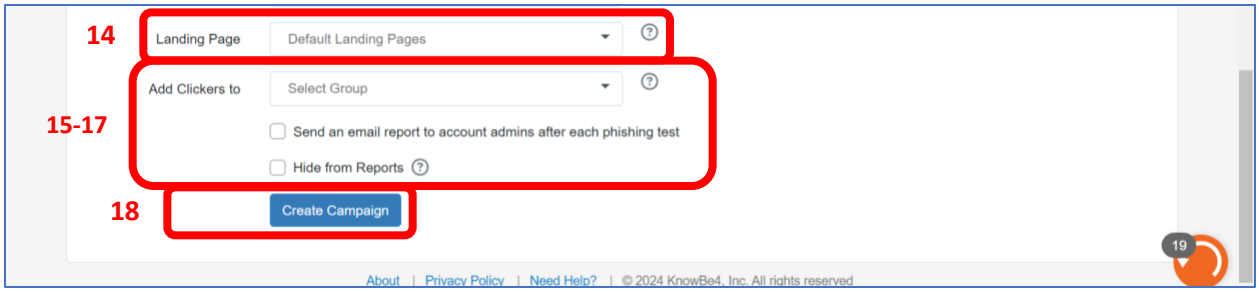

14. **Landing Page.** Select the **Basic Oops!** Landing page.
15. **Add Clickers to.** Select the same **Clickers Group** that you selected for #3 above.
16. Click the **Send an email report to account admins after each phishing test** button.
17. **Hide Reports.** Do not click this button.
18. Click the **Create Campaign** button to schedule the test.

As with the Create Training Campaign function, you can edit the Phishing Test Campaign by clicking the **Edit** button.

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