

How to use your organization page

Your organization page is where you send playbook codes, see how many are used, add your name and logo, and invite your staff. These steps cover everything on it, in the order most organizations use them.

Sign in the first time

1. Open the link in your welcome email ("Your organization page is here"). Keep that email: the link is your page's address.
2. **Your own login (recommended).** Press **Use your own login instead** and create a login with your work email. Confirm your email from the message we send, then set up a **second step**: an authenticator app, a passkey (Face ID, Touch ID or Windows Hello) or a security key. **Save the recovery code** it shows you somewhere safe.
3. **Or a shared password.** Choose a password of at least 12 characters. Anyone with the link and the password can use the page, so switch to personal logins when you can.
4. **On the full toolkit** (Shop, Team or Unlimited) there's no shared password: press **Create your login** and every tech signs in with their own login and second step.
5. Next time: open the same link and press **Sign in with your own login**, or enter the password. Or go to business.familysecurityplaybook.com/signin and press **Sign in with your own login**.
6. **Lost the link?** On the [sign-in page](#), enter your email and press **Email me the link**. It goes only to an address on file for your organization.

Find your way around

- The home screen shows your plan and how many playbooks you have left, **Build one with a client now**, **Open your examples** (sample playbooks to share), and four tiles. Press a tile to open it; press **Back to home** to return.
- **Give out playbooks**: email codes to your list, create codes to hand out, and small office codes.
- **Recovery reports** (full edition): a written report for every scam or break-in job.
- **Keep clients engaged**: one small task a month for your clients, the free quiz and practice calls, and the workshop kit.
- **Your account** (owners): your details and logo, your people, printed copies and your plan.

Add your details first

1. Press **Your account**. In **Your details**, add your organization's name, phone number, website and logo, and your colors if you like.
2. They appear on the page people use to enter their codes, on every email we send for you, and on playbooks from the full edition.
3. Add **a sentence about you**, and links to **your privacy policy** and **your refund policy** (https links from your own website). They appear on your free tools page and at the bottom of every page with your name.
4. Only owners can change these.

Give out playbooks

1. Press **Give out playbooks**.
2. **Email codes to your list**. Paste email addresses (one per line) or upload a CSV file, add a short note if you like, tick the box to confirm these are your own

members or customers, and press **Send codes**. Each person gets one code by email from "your name via Family Security Playbook". We don't keep the addresses.

3. **Create codes to send yourself**. Choose how many and press **Create codes**. Copy them into your own letters or newsletter, or download them as a spreadsheet.
4. **Build one with a client now** is on the home screen. Sitting with a customer? Press **Start a personal playbook** (or **Start a Small Office playbook** on the full edition). It opens in a new tab with your name on it. Fill it in together, and before they leave, give them the code shown so they can update it later.
5. **Small office playbooks** (full edition). Create office codes and send each business client its own link.
6. **Revoke a code** (in **Give out playbooks**). Sent one to the wrong person, or someone shouldn't keep their playbook? Type the code, tick **I understand this can't be undone**, and press **Revoke this code**. The code stops working and the playbook it opened stops opening; anything already downloaded or printed stays with the person.
7. People enter their code at your page's address, shown on your organization page (it ends in /p/ and your name).

See how it's going

- The top of the page shows how many playbooks your plan has left, and how many codes were created, emailed and used.
- On a monthly plan, unused playbooks carry over for 12 months; the oldest are used first.
- **Keep clients engaged** starts with **How your free tools are doing**: how many times this month and last month your free tools page was opened, quizzes and checkups were finished, practice calls were opened, sample playbooks were downloaded and

(full edition) Readiness Checks were finished and sent to you. They're counts only: nobody's answers or names.

Share the free tools

1. Press **Keep clients engaged**.
2. **Security Readiness Check** (full edition): about 25 questions a business answers in 5 minutes, with a score, the five most important fixes and a PDF report with your name and phone. It's on your free tools page. If they tick the box, their score and answers come to your email (the **Reply-to email** in Your details), ready for you to reply; we don't keep a copy.
3. **Your free tools page**: press **Open your free tools page** on the home screen. It has every free tool with your name, phone, email, website and policies, plus the box to enter an access code. It's the best single link for your website, newsletter or email signature.
4. **Examples to share**: press **Open your examples page**. It makes sample playbooks (and, on the full edition, a sample office playbook and recovery report) with your name and phone, stamped "Sample", to print, email or put on your website. It also lists your free tool links and code to paste into your website. Send the page itself to anyone who wants to see what they'll get.
5. **Help your members practice** lists your own copies of the scam quiz, the practice calls, the office checkup, the office drill, the security calendar and your examples to share, with your name and phone on them. Paste the links into a newsletter or email.
6. **See a filled-in sample**, next to the quiz, the practice calls, the office checkup, the record sheet and the office drill, opens that tool filled in for a made-up family, office or person, with your name on it and its printout ready to print. Each of those tools also has a line at the top, **See a filled-in sample (with its printout)**, so people see what they'll get before they start. A sample keeps nothing, never

touches a visitor's own answers, and isn't counted in How your free tools are doing. It always shows your current name and details, so there's nothing to update when you change them.

7. **Run a scam-call workshop** opens a 45-minute session plan with a handout to print.
8. **One small task a month for your clients:** add the emails of clients who asked for it, tick the box, and press **Send our clients one task a month**. Each gets a 10-minute security task by email each month, with your name.

Invite your staff (owners)

1. Press **Your account**. In **People**, type a person's email, choose **Staff** (creates codes, sends emails, runs recovery reports) or **Owner** (can also change your details and invite people), and press **Send invitation**.
2. They open the invitation, create a login **with that same email**, confirm it, and set up their second step. The invitation works once, for 7 days.
3. To remove someone, press **Remove** next to their name. They're signed out of your page at once.
4. Once everyone has their own login, press **turn off the shared password**.
5. **Full toolkit plans** count techs: everyone on the list plus open invitations. Shop includes 5, Team 20 and Unlimited any number. The People card shows how many you're using; when you're near the limit it links to the bigger plans, and we refund the unused part of the old one.

Can't sign in?

- **Forgot the shared password?** Press **Forgot your password?** on the sign-in page, or ask JCady to clear it; you'll create a new one the next time you open your link.

- **Personal logins not working** (or your only owner has left)? Email jeff@jcady.org. JCady can turn your shared password back on and email your owner the page link to set a new one. On the full toolkit it works for 7 days, then personal logins only again.
- **No link?** Sign in from [the sign-in page](#) with the email your organization bought with. If nobody at your organization has signed up yet, that login becomes its first owner. Otherwise ask an owner to invite you.
- **"Please confirm your email address first"?** Open the **Verify your email** message the sign-in service sent you (check spam), press its button, then press **Sign in again**.
- **Lost your second step?** Use the recovery code you saved when you set it up.

Your own website

1. Press **Your account**, then go to **Your tools on your own website**.
2. **To show your tools inside a page of your website:** every free tool has its own code: your free tools page (all of them), the scam quiz, the practice call, the office checkup, the office drill, the record sheet, the calendar and the sample playbooks (and the Readiness Check on the full edition). Open the one you want and press **Copy the code**.
3. Paste it into your website's page editor: in WordPress a **Custom HTML** block, in Squarespace a **Code** block, in Wix **Embed** then **Embed HTML** (Custom embed), in GoDaddy an **HTML** section. Publish the page. The tool shows inside your page with your name on it, and the box grows to fit it, so nothing is cut off. Keep both lines of the code: the second line is what sizes the box.
4. Website can't take code? Each tool's link is shown above its code: link to it from a menu, a button or a newsletter instead.

5. Next to the link of the quiz, the practice call, the office checkup, the office drill and the record sheet is **See a filled-in sample**: the same tool filled in for a made-up family or office, with your name. Link to it as an example anywhere on your website. Inside your page, the tool's own sample line opens the sample in the same box.
6. Only your own website can show them. The website in **Your details** is allowed automatically; add any others under **Other websites of yours that may show them** and press **Save websites**.
7. **To give them your own web address** (like tools.yoursite.com): type the address and press **Add this address**.
8. Then sign in where your domain's DNS is managed (the company you bought the domain from, or Cloudflare) and add the record shown: **Type** CNAME, **Name** the first part of the address (like tools), **Target** partners.familysecurityplaybook.com.
9. Come back to the same card. It usually says **Active** within 5 to 30 minutes, with a secure (https) certificate made for you. If it still says it's waiting after an hour, add the TXT record it shows too.
10. Your address opens your free tools page. It also has /quiz, /drill, /checkup, /office-drill, /calendar and /examples (and /readiness on the full edition), all with your name.
11. To stop, press **Stop using this address**, then delete the DNS record.

Printed copies (optional)

1. Press **Your account**, then connect your own Lulu print account in **Printed copies through your Lulu account** and members can have their playbook printed and mailed to them, billed to you by Lulu.
2. The [Lulu setup guide](#) walks through it, including a test run in Lulu's test mode.

Recovery reports (full edition)

On a scam or break-in job, open **Recovery reports** to write the customer's report as you work. See [How to write a recovery report](#).

Your plan

- **Ready for more?** appears on the try-it-out plan: move up to a yearly or monthly plan and keep your page and counts.
- To change plans, get an invoice, or cancel, email jeff@jcady.org. Playbooks people already downloaded are theirs to keep.

Stuck?

Email jeff@jcady.org or call (520) 223-9878 ext. 800, and say which page you're on. We'll never ask for a password, a code from your phone, or a card number.