STAY SAFE ONLINE

WhatsApp business safety checklist

Name _____ **Business** _____ **Date** _____

You will finish with
Every phone that runs your business WhatsApp locked down, and WhatsApp rules your staff can follow.

Do this with your phone in your hand.

1. Secure every phone that uses business WhatsApp

- **Two-step verification** (a 6-digit PIN you choose, needed when your number is set up on a new phone): Settings > Account > Two-step verification. Keep the PIN somewhere private, not on this page or in a chat.
- **Linked devices** (computers or tablets that can also open your WhatsApp, e.g. WhatsApp Web): Settings > Linked devices. Log out any you do not know.

Do one row for each phone. Tick each setting once done.

Phone (whose)	Two-step verification on	Linked devices checked	Screen lock on
e.g. My Samsung	Yes	Yes, removed 1 laptop	Yes

2. Our WhatsApp rules

A familiar name or profile photo does not prove who is messaging. A screenshot of a payment can be faked: your bank account is the only proof. Tick each rule once everyone who replies to customers knows it.

CHECKLIST

- [ ] We release goods or start work only after the money has **cleared** (it shows in our bank balance, checked in the banking app)
- [ ] We check the amount and reference match the order
- [ ] A refund to a new account, or new supplier banking details: we call first on the number we already had
- [ ] We do not open unexpected links, even from a contact we know
- [ ] We send ID copies, bank statements and contracts only to numbers we have saved
- [ ] We never send a verification code or OTP in a chat, even to "WhatsApp support"

This resource is for educational purposes only. It is not tax, legal or financial advice. Rules and requirements can differ by business type and location. Check with the relevant authority or a qualified adviser for your situation.

3. Keep records outside WhatsApp

Chats can be deleted or hacked.

- **CHECKLIST**
  - [ ] I chose one place to save quotes, invoices, proof of payment and supplier banking details (e.g. a Google Drive folder or a file box)
  - [ ] I saved this month's quotes and invoices there

Next step

Finish the setup

What I will do	Fill any empty box in section 1 (e.g. switch on two-step verification on my staff member's phone), then show section 2 to everyone who replies to customers
Who	
By when	

When to redo this

Check linked devices on every phone in section 1 once a month, and on the day a phone is lost or a staff member leaves.

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