Klipfolio

Jumpstart for Partners

Everything you need to know about
Klipfolio's Partner Program

Lesson 1:

Partner Program Overview

Welcome to Klipfolio's Partner Program! We're so glad you're here.

We have created this series of onboarding modules to help ease your transition to Klipfolio. These lessons are structured to give you insight into the Partner Program and to help you familiarize yourself with fundamental features of your account. We hope to lay a solid foundation for your Klipfolio journey.

Topics we will cover:

1. Client Management
2. Dashboard Management
3. White Labelling and Customization
4. How to be successful with Klipfolio

Additional Resources

Note that in some of the lessons there are links to downloadable checklists.
We encourage you to download and print these off to help you as you work through the various lessons in Klipfolio.

If you need additional assistance, keep the tools below in your back pocket as you navigate Klipfolio.
Or, as always, don't be shy to drop us a line. We're always available to help!

Klipfolio Courses

Grab a coffee, and dig into our modular learning programs. They're designed to teach you what you need to know in order to build custom Klipfolio dashboards. Learn at your own pace, and we will remember where you left off.

Klipfolio Help Center

The Klipfolio Help Center allows you to interact with the Klipfolio community, search documentation, watch helpful how-to videos, or submit support requests.

While you're here and before you get started, you should know about our Partner Directory and Klipfolio Certification program.

Becoming Klipfolio Certified will validate your dashboard building and reporting expertise, identify gaps in your Klipfolio knowledge, and help you stand out amongst the other Klipfolio Partners. As a Klipfolio Certified Partner you demonstrate that you have the highest level of knowledge around planning, deploying, and managing Klipfolio dashboards and reports.

Upon passing the exam, your company will be added to the Certified Partners section of the Partner Directory, exposing your business to our thousands of Klipfolio clients and web visitors. You will also be given a Klipfolio Certified Partner badge to feature on LinkedIn and your website; an added bonus to showcase that you are steps ahead of your competitors.

Last but not least, we want to invite you to be a part of our Klipfolio Insiders. This invitation-only community allows you exclusive opportunities to peek under the hood and test new features, be rewarded with free upgrades to your Klipfolio account, and provide feedback directly to our product team.

Alright, now we can get started!

Lesson 2:

Client Account Management

One of the biggest differentiators between Klipfolio and Klipfolio for Partners is the ability to create and manage client accounts.

To add a client, start by clicking the *Clients* tab on the left hand navigation pane

To add your first client, select the orange *Add a Client* button on the top of the page

From here, you can fill out all of your client's information, including their company name, company description, account status, and billing options

Account Status

Set-up Mode
Select this mode while you are in the process of building dashboards and not ready to reveal them to your clients just yet.

Trial
By choosing *Trial* you act as Klipfolio to give your clients the ability to test and play around in the application for themselves before deciding to use it. You have the ability to select a trial that lasts up to 14 days.

Active
By setting your client account to the *Active* state, your client can navigate their dashboards and monitor data in real time. Keep in mind that once a client is *Active*, you cannot revert them back to *Trial* or *Setup* status. *Active* state also requires you to modify the number of resources and features you want to grant. More on this later.

Disabled
By selecting *Disabled*, you can pause a client account. The resources you assigned to this client when you activated it are returned to the parent. Deleting can be done to any state.

Billing Status

Managing billing yourself
When you choose to manage billing by yourself, you can price Klipfolio to your liking and can charge as much or as little as you want. Many of our Partners choose to use Klipfolio as a value add for their clients and integrate Klipfolio into their existing business models.

Let Klipfolio manage your billing
If you choose for Klipfolio to manage client billing, your clients' accounts will switch to trial accounts and upon logging in, they will be prompted to select one of Klipfolio's pricing plans.

Define Resources

Setting your clients to an *Active* state enables you to assign resources and choose features for that client.

Dashboards
Number of dashboards you can set up for your client.

Users
How many named users can be added to your client.

API Calls
Refer only to calls made to the Klipfolio API. It is NOT required for client data sources to update and is therefore typically be set to 0.

At this time you also get to define the features you will be using for your client. Select any combination of: download reports, email reports, embedded links, private or public links, and SSO.

Save; your client account has now been created. By clicking on the sign in as Admin tab beside the client you created, you can login and manage their Klipfolio account as you would your own (i.e. build dashboards, generate reports, etc.)

Managing clients in this way will not only allow you to keep everything organized it also gives you the best foundation on which to build. In the next lesson we will share the best practices for managing dashboards for your clients.

Lesson 3:

Dashboard Management

Dive into the foundation of Klipfolio Partner accounts: building and monitoring dashboards for your clients

In this lesson we will show you two of the main ways you can create and share dashboards and some of the best practices.

Use Instant Klips and Dashboards

Want to get something set up quickly or while you learn how to build your own?

1. Go to *Clients* and click *Admin* to the right of the client you want to build for

2. Click the "+" to the right of Dashboards, this will open a new blank dashboard

3. Click *Add a Klip* at the top of your Dashboard. Select *Klip Gallery* and add the ones you want.

    If your account is branded the *Gallery* will be disabled Click Here to access and add *Klips* to your account

4. Want to add a full *Dashboard*?

    • We offer a number of dashboards you can choose from. Once you've found one you like, click *Get This Dashboard* and it will be added to the client you have open.

How to create unique dashboards for your clients

1. Go to *Clients* and click *Admin* to the right of the client you want to build for

2. Click *Data Sources* in left navigation pane

3. Click *Create a New Data Source*

4. Select a service from the list or if it isn't listed try one of the core connectors to set up your data source

5. Model the data or click *New Klip* to start building

6. Add the *Klip* to your *Dashboard* and repeat steps 2-6 as required

How to create a Dashboard template in your Parent account that you can import into Client accounts

One of the most common use cases we see is agencies and consultants who want to save time by building dashboards to use as templates for multiple clients. These templates can be imported to each of your client accounts and then, if required, linked to their individualized data. Importing a dashboard maintains the layout, creates

copies of each Klip and the Data Sources and gives you the option to update copied Klips in all clients from the Parent.

Note: It is recommended that dashboard templates be custom built. While the pre-built gallery Klips can be imported, do not connect them prior to importing to clients.

Advanced: When you have access to data for multiple clients with a single login, such as for example Google Analytics MCC, Facebook or SQL you can create Dynamic Data Sources. This sort of data source uses the value for a specific client as a variable and can therefore leverage Company Properties to simplify import.

1. Sign into *Parent* account

2. Create the dashboard you want to import into your clients

3. Select *Clients* from the left navigation pane

4. Sign in as an *Admin* to the client account to which you wish to add the dashboard

5. Click *Dashboards* in the left navigation pane then click the blue *Import* button on the top right corner of the page

   • Note: These same steps apply for importing *Klips* and *Data Sources* as well

6. In the first dropdown select your *Parent* account. Then select the *Dashboard(s)* you wish to import

7. Click *Next* to be given a summary of the Dashboard and its associated *Klips* and *Data Sources* that are being imported

8. Click *Import Now*

9. Click the *Dashboard* you just imported

10. Select *Open Dashboard*

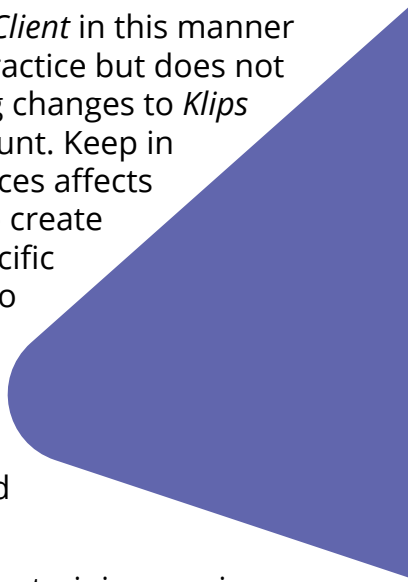11. Don't forget to share *Dashboards* with the users in the *Client* account!

Update Imported Klips from your Parent Account

Importing not only speeds up rolling out your custom dashboards to clients it also gives you the option to update all copies of the *Klips* at once! To make changes to imported *Klips* you make the change to the original in your *Parent* account and push these to the copies in your *Client* accounts.

1. In *Parent* account select *Klips* from left navigation pane

2. Search for the *Klip* that you would like to update. You will notice a button labelled *Client Instances*. You can click here to to reveal to which Clients you have imported this Klip.

3. Edit the *Klip* to apply the changes

   • Note: If you need to modify the data source to include additional data you will need to re-import as updating instances only applies to *Klips*

4. Click *Update Client Instances* to push all changes you made to the Klip to all instances in your *Client Accounts*

Operating from *Parent* to *Client* in this manner is a recommended best practice but does not preclude you from making changes to *Klips* directly in the *Client's* account. Keep in mind that updating instances affects all copies and therefore to create a unique version for a specific client it is recommended to either first duplicate the imported *Klip* and then make all modifications to the copy or if for multiple clients create in *Parent* and import.

Need help? We provide free training sessions to all new partners and Ninja Services can be added to any subscription.

Lesson 4:

Whitelabelling and Customization

Apply your branding and remove Klipfolio branding altogether, meaning you can create a unique experience for each of your clients.

In this lesson, we explain the different ways you can customize your Klipfolio account. We understand that maintaining brand consistency is important. Customization allows you to apply your branding and remove Klipfolio branding altogether, meaning you have the ability to create a unique experience for each of your clients.
Note: White Label is a paid add on. Interested? Consider this bundle!

How to White Label a Klipfolio account

1. Sign into your *Parent Account*

2. Click *Account* accessed by the sub menu under your name

3. Click *Settings*

4. Click *White Label* from the side navigation

5. Once in the *White Label* window you will be able to make changes to customize every aspect of your Klipfolio account:

   • Product Name

   • Rename the terms Klips and Dashboards

   • Links and Footer (help, legal, powered by, and hide the copyright notice)

   • Support email (After Domain Alias and Email Redirection is completed replace the from address in emails sent out by the application)

   • Embeds (change the call-to-action text)

   • Sign in logo

   • Footer logo

   • Email logo

   • Favicon (replace the icon associated with your brand that appears in the user's device home screen)

   • Home screen icon

Note: Your white label settings will apply to all clients except those that you set up to be billed by Klipfolio

How to override Klipfolio branding using CSS

1. Click *Branding* from the side navigation

2. Click *Edit* and you will be shown options:

   • **Default**: Select light or dark standard Klipfolio themes

   • **Custom:** You have the ability to change many

facets of the Klipfolio app including:

Icons for both the web and mobile applications

Click base theme to select light or dark

Dashboard CSS allows you to fully customize and override the existing dashboard style

Application CSS allows you to change the login screen and all other components of the Klipfolio app. You can view samples here.

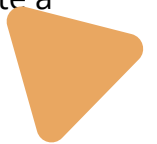Update the dashboard script or application script to make things more dynamic

Note: Clients with the CSS feature enabled will, by default, inherit the theme from the Parent.

This can however be modified by client to create unique custom themes for each.

How to set up a custom Domain

Domain Alias allows you to create a unique Dashboards.CompanyName.com URL where users can login or for use with *Published Links*. Setting up a *Domain* takes 3-5 business days and is a prerequisite to configuring Email and Oauth Redirection.
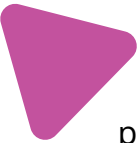
Once purchased, either stand alone or as part of *White Label*, there is a form to fill in which when submitted will automatically create a support ticket and start the process.

Lesson 5:
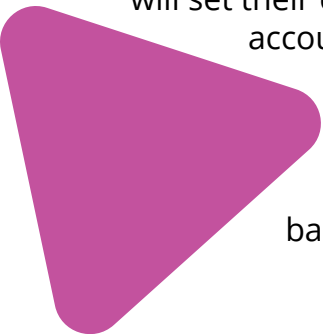
How your business can succeed with Klipfolio

Build a business of delivering dashboard solutions to your clients

Our Partner, Cervino Marketing, has a client base of marketing agencies who like any service business, need to provide regular activity and performance reports to their clients. However, prior to engaging with Cervino, gathering the data from multiple sources was very time-consuming. Once they had the correct data, the agencies needed to put that information into Excel spreadsheets and/or PowerPoint presentations. On average, each report took two or more hours; multiplied across the client base, that was a significant amount of time and energy spent on monthly reporting.

As one of Klipfolio's largest business partners in Europe, Cervino Marketing designs and deploys smart dashboard software that incorporate data from numerous data sources, delivering near real time visibility into key marketing numbers and metrics.

Build on-demand, highly customized dashboard reports

Pena Business Data Reporting develops highly customized dashboards on behalf of their clients. Pena Business Data Reporting will set their clients up with a Klipfolio account, connect them to virtually any supported API, setup databases when needed, offer custom CSS and HTML styling and build custom dashboards based on each clients needs.

Use dashboard reporting as a value add to your current service offering

When asked how his team use Klipfolio, Alastair Barlow, co-founder of flinder, a registered accounting practice in the UK, said, "We may be a little different than the average Klipfolio user in that while we do use it for ourselves, the main purpose is to provide insight to our clients."

Their team starts off with a strategy and business objectives workshop to translate the client's objectives and distill it across various functions within the business. Flinder provides insight to help their clients meet their objectives by building dashboards to track an array of metrics across multiple functions which include financial analytics, cash management, and prospect opportunity management.

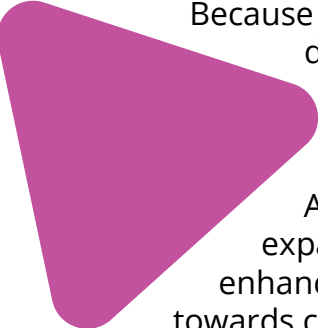## Help your clients make better business decisions

Since 2013, RootedElm has worked alongside the A&W digital marketing team, supporting them with their email program: Mug Club. In 2018, with steady subscriber growth averaging 5% each month and an average click-to-open rate of 21%, the A&W marketing team felt confident to expand their email marketing program and increase engagement.

RootedElm's ultimate goal was to improve the overall subscriber journey by using data to identify gaps in the current process. By transforming the unsubscribe data into a visual bar chart using Klipfolio, they were able to interpret subscriber behavior efficiently.

Turns out the problem behind unsubscribe behavior was simple, and all too common, A&W just needed to get more personal with their welcome email.

Using a dashboard was one form of listening; their next task was to validate their findings by asking their Mug Club subscribers directly through a brief online survey. The outcome of the study confirmed the interest of mobile coupon redemption, online ordering, text messaging and that they needed to recognize our subscribers' enthusiasm and loyalty to the brand more often.

Because of the combination of a visual dashboard, data collected from other sources, one 3-minute survey, internal insight and old-fashioned instinct, A&W now has a solid plan to expand their subscriber reach and enhance engagement as they head towards celebrating their 100th birthday.

Leverage Klipfolio integrations to centralize business functions

Spoonity CEO & Co-Founder Max Bailey, is a serial entrepreneur who is passionate about helping restaurants grow and attract new customers. He's especially motivated to reach younger generations by focusing on marketing operations, data analysis and resource management.

Spoonity offers detailed dashboard reports for their customers so they can easily track reward app performance.

The Spoonity team also took advantage of centralizing a lot of their customer interactions by signing up for the HubSpot for Startups program, which gives seed stage startups 90% off HubSpot's marketing and sales tools.

Max says, "We use both HubSpot and Klipfolio and the combination is awesome. Klipfolio allows our management team to monitor our sales, marketing, accounting, customer success, and onboarding all in one place which keeps our entire team on the same page."

The bottom line: your partnership with Klipfolio presents huge opportunity for your business and the relationships you have with your clients. If you have any questions or want to talk with one of our experts about how you can get the most out of your partnership with us, please reach out. We would love to chat!