Client Management Setup Checklist

- ❏ Start by clicking the *Clients* tab on the left hand navigation pane

- ❏ 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:
    - ❏ Company name
    - ❏ Company description
    - ❏ Account status
    - ❏ Billing options

  Note: Setting your clients to an Active state requires you to assign resources to them.

    - ❏ Number of Dashboards
    - ❏ Number of Users
    - ❏ API Calls
    - ❏ Define your client's sharing capabilities by selecting any combination of: download reports, email reports, embedded links, private or public links, and SSO.

  Keep in mind: the number of resources you allocate to your clients comes out of your quota that is defined in your from the plan in your Parent account. It is important to familiarize yourself with your limits before allocation

- ❏ Click *Save*

- ❏ Click on the *Admin* tab beside the client you created to login and manage your client's account

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.