# How to create and update Dashboards and Klips in your Parent account and import them into Client accounts

**How to create a Dashboard template**

- ❏ Sign into *Parent* account

- ❏ Create the *Dashboard* you want to import into your clients.

- ❏ Select *Clients* from the side navigation

- ❏ Sign in as an *Admin* to the client account to which you wish to add the dashboard

- ❏ Click *Dashboards* in the side navigation 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)

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

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

- ❏ Click *Import Now*

- ❏ Click the *Dashboard* you just imported

- ❏ Select *Open Dashboard*

- ❏ Don't forget to [share](#) Dashboards with the users in the client account!

**Update Imported Klips from your Parent Account**

- ❏ In Parent account select *Klips* from side nav
- ❏ Search for the *Klip* that you would like to update. You will notice a button labelled *Client Instances*. You can click here to reveal how many and to which *Clients* you

have imported this *Klip*.

❏ 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.)

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