

How to create dashboards for your clients

Use Klips and Dashboards Klipfolio provides

- ❑ Go to *Clients* and click *Admin* to the right of the client you want to build for
- ❑ Click the “+” to the right of *Active Dashboards*, this will open a blue panel
- ❑ Want a blank *Dashboard*, click orange *Add a Blank Dashboard* button
- ❑ Click *Add a Klip* at the top of your Dashboard
- ❑ Select *Klip Gallery* and add the ones you want

Want to add a full Dashboard;

- ❑ On the right hand side, under *Dashboard Gallery*, click *More*
- ❑ Browse and once you’ve found one you like, click *Get This Dashboard*

How to create unique dashboards for your clients

- ❑ Go to clients and click *Admin* to the right of the client you want to build for
- ❑ Click *Data Sources* in left nav
- ❑ Click *Create a New Data Source*
- ❑ Select a service from the list or if it isn’t listed try one of the core connectors to set up your data source.
- ❑ Model the data or click *New Klip* to start building
- ❑ Add the *Klip* to your *Dashboard* and repeat steps 2-6 as required