# DIY New Client Checklist

Great! You've signed a new client! The checklist below should help you (and them) get started!

❏ **Assign the salesperson**

You'll want to keep a salesperson assigned as they will be notified of customer activity if they are added to a campaign (i.e. opened email, clicked Call to Action, etc) or if they express interest in any new products via the Business Center. The salesperson will also see their accounts in the Sales Tool so they are able to monitor and add sales records to monitor revenue. For the salesperson to get notified of these activities, it is important to assign your accounts.
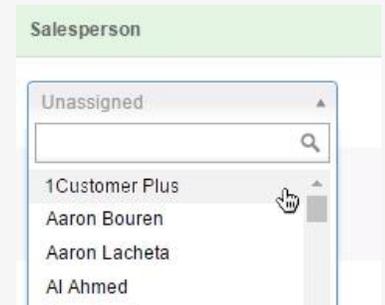
❏ **Convert the Demo account to paid (if applicable) or Create the Paid account**

If the client was added as a prospect using the Sales Tool you'll need to convert the account to paid. Full instructions here. NOTE: If the account was *not* created as a Demo, you will need to create their account via Partner Central using these instructions.

❏ **Activate the products that you require**

Since the Sales Tool only creates accounts for Reputation Management and Presence Builder, you will need to turn on any other products the client purchased. This is all completed in Partner Central >> Accounts >> Click the account name to make these changes (e.g. FAQ to activate LD is here). You will see all your Product Catalog items there as well.

❏ **Optimize Reputation Management account**

Even when sold as a DIY product, it's still a good idea to ensure the accounts you create are optimized for your clients use.

- **Listings & Reviews -** Ensure the business data (name, address, phone number and website) was entered into the account correctly. Reviews will only be pulled in if we find their relevant listing on the Listings tab. If you know they have existing listings for certain sites, verify they have been found. Follow these steps to manually add listings if missing.

- **Mentions -** You may choose to get some Mention searches started for you client. Click the gear icon to begin adding relevant search keywords to monitor when the business is mentioned online. It is suggested to include the business name, common name, any managers or owners' names, and twitter searches (@businessname, #businessname).

- **Social -** Setup of Social Accounts is typically this will be completed by the client, but for information on how to authenticate social accounts see here.

- **Competition -** Double check that the service categories (Key Words) and competitor names that were added during account creation are accurate. More info [here](#).

  - You can also add the competitors' social accounts for Facebook, Twitter, and Foursquare so your client can start seeing their Social Audience comparison.

- **Reports -** The client will be able to edit these and we should have you set up with your default preferences but you can click Edit Report Settings to set up the alert settings, email recipients, and frequency of executive reports.

Overview	Listings	Reviews	Mentions	Social	Competition	**Reports**

Reports ⓘ

close report settings ▲

Send to:

Preferred Email Address *

Additional Email Addresses

Send me:

❏ Optimize Social Marketing

Similar to Reputation Management, some partners may choose to complete a few items in Social Marketing for your clients use.

- **Lead Searches -** You could start your client out with a few searches to help [find leads](#) that your client can reach out to with special offers or deals.

- **Interesting Content** - Edit which [RSS Feeds](#) are set on the account so the client can easily find content for social posting.

❏ Create User

Once all the products are created and optimized, you'll want to ensure the client has access.
If the client was created using the Sales Tool, they likely have a login already. If they are a brand new account you'll need to [create a new User](#). Both searching for and creating new users can be found in Partner Central under the Users tab.

❏ Provide client with available resources

Our Resource Center has some great unbranded material and videos that can be shared with your client to help them learn the products.