



Onboarding a New Account

Checklist

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1. Select the Geography

1.1 Confirm Location

This step is critical because data is subject to the laws and governance of the geographic location in which the data is collected and processed. This concept is known as *Data Sovereignty*. To adhere to Data Sovereignty requirements, the new account will be bound to the region in which it is created, which may be:

- a. AU (Australia), or
- b. UK (United Kingdom)

1.2 Sign In

When the region has been confirmed, sign in to your Smarter Drafter Account using [SSO](#). Ensure that you are signed into the correct region:

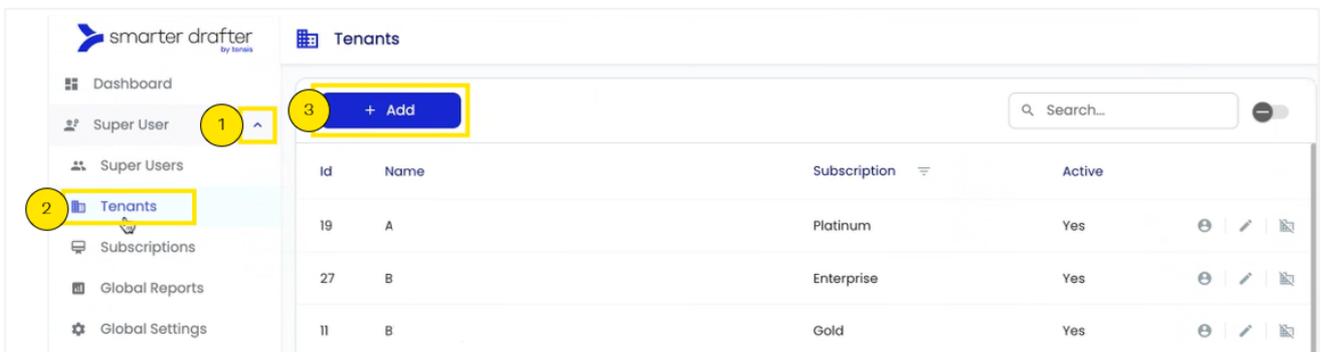
- c. AU: app.smarterdrafter.com.au
- d. UK: app.smarterdrafter.co.uk

Contact a member of the product team, who will assist you to turn on feature flags depending on the user's agreed configuration. Review the Statement of Work to ascertain what features are included.

2. Add the Account

To add a new account:

1. Drop down the **Super User** menu in the navigation menu.
2. Click **Tenants**.
3. Click **Add** to add the new account.

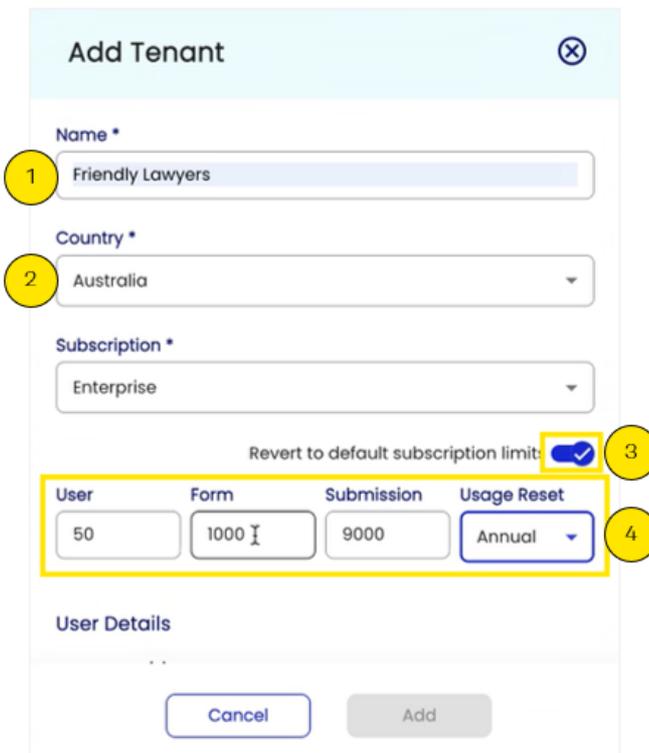


Id	Name	Subscription	Active
19	A	Platinum	Yes
27	B	Enterprise	Yes
11	B	Gold	Yes

2.1 Add Tenant Details

The **Add Tenant** pop-up opens.

1. Enter the **name** of the account.
2. Ensure the **appropriate country** is selected.
3. Toggle on the option to **Revert to default subscription limit**. This will set the **user, form and subscription** limits.
4. Under **Usage Reset**, select the account renewal schedule.



The screenshot shows the 'Add Tenant' pop-up form with the following fields and options:

- Name ***: Text input field containing 'Friendly Lawyers' (callout 1).
- Country ***: Dropdown menu showing 'Australia' (callout 2).
- Subscription ***: Dropdown menu showing 'Enterprise'.
- Revert to default subscription limit:** Toggle switch that is turned on (callout 3).
- User**: Input field with '50' (callout 4).
- Form**: Input field with '1000' (callout 4).
- Submission**: Input field with '9000'.
- Usage Reset**: Dropdown menu showing 'Annual' (callout 4).

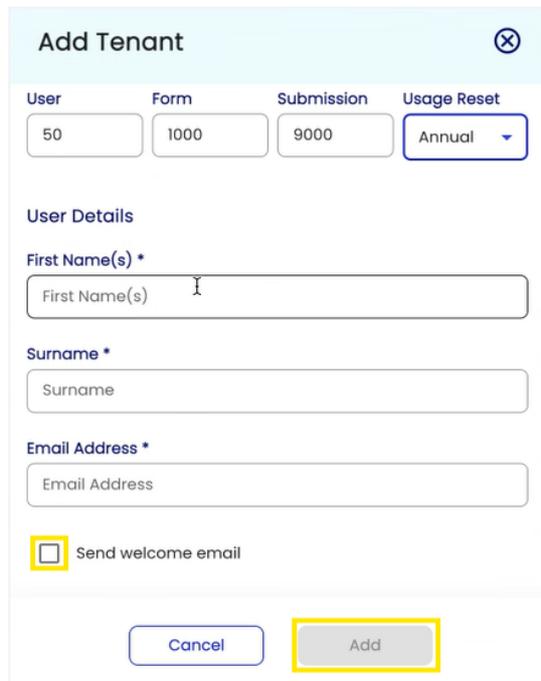
At the bottom of the form are 'Cancel' and 'Add' buttons.

2.2 Add an Administrator

Include **User Details** for the first admin and owner of the account. This will require some coordination between you and the new account holder. You'll need to:

1. Identify the person in the tenant organisation who will have admin level permissions and be capable of approving the SSO application.
2. Invite them via email to the Smarter Drafter account.
3. Make sure they login using SSO.
4. They will be presented with the flow to approve the application.

Ensure that the box is ticked to send a **welcome email**. Click **Add**. The new account will be created and appear in the list of tenants.

A screenshot of the 'Add Tenant' form. The form has a light blue header with the title 'Add Tenant' and a close button (X). Below the header are four input fields: 'User' (50), 'Form' (1000), 'Submission' (9000), and 'Usage Reset' (Annual). Underneath is a section titled 'User Details' with three required text input fields: 'First Name(s) *', 'Surname *', and 'Email Address *'. Below these is a checkbox labeled 'Send welcome email' which is currently unchecked. At the bottom of the form are two buttons: 'Cancel' and 'Add'. The 'Add' button is highlighted with a yellow border.

2.3 Contact the Administrator

The Admin for the new tenant account will receive an email with a temporary password and a **Sign In** link. Check in with the new account holder to ensure that they have signed in, and they are using the platform that is correct for their region:

1. AU: app.smarterdrafter.com.au (Mention to the account holder that they should use the enterprise login if in Australia).
2. UK: app.smarterdrafter.co.uk.

2.4 Set Up Permissions

Work with the account admin to set up permissions for the users in the organisation:

1. Follow the [current process for setting up users and permissions](#).