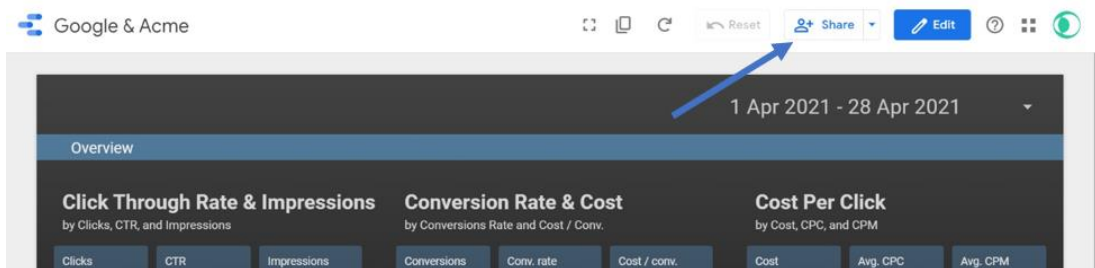


Add Data Studio Reports on Clientshare

Firstly, ensure you are an admin on your Data Studio site and have access to all the reports you intend on adding to Clientshare.

At the bottom of the main dashboard, you can view the reports accessible to you. The information you need to gather can be found on the report itself.

Once you are on the report, the credentials you need to gather can be found by clicking **Share**.

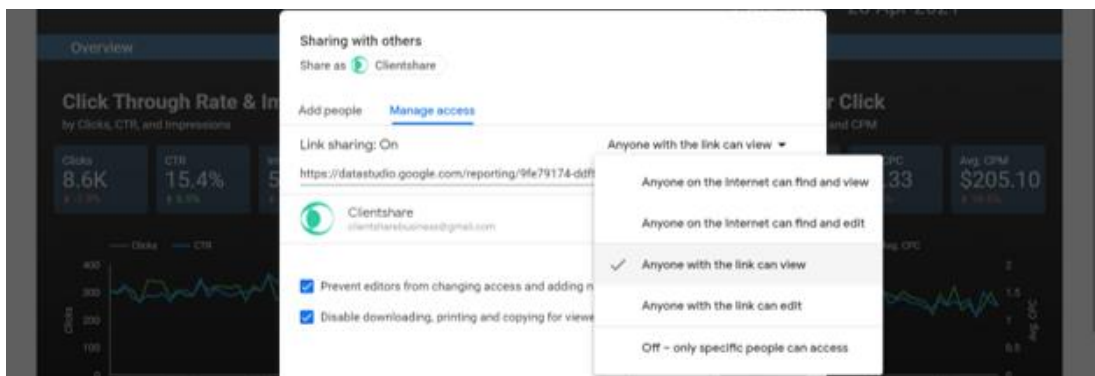


Make your reports viewable for others

Click **Share > Manage Access**

The default settings should have both check boxes unticked and the **Link Sharing** set to **Off**.

To grant viewing permissions on Clientshare, select the dropdown list and change it from **Off** to **Anyone with the link can view** and **Save**.

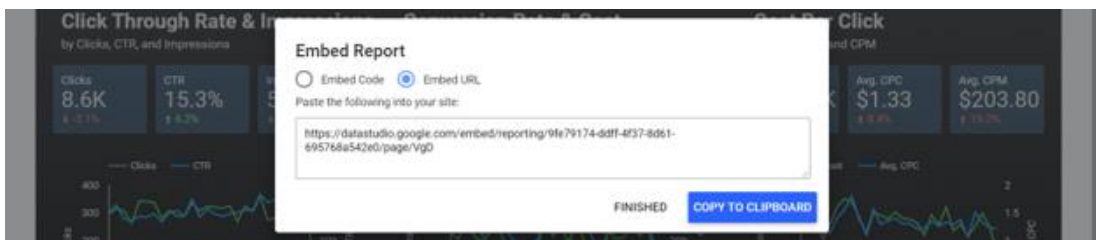


If you do not have these options available, this may mean you are a **Google Workspace User** and your reports have been restricted to users within your domain. We recommend that you manage reports on one central account which is open to sharing across all domains.

Generate an embed link for your report

Make sure you allow embedding for your report as you will need to get the report URL.

To embed your report, click the small arrow next to **Share** labelled **Embed Report**. Check the **Embed URL** button, and copy the link to your clipboard.

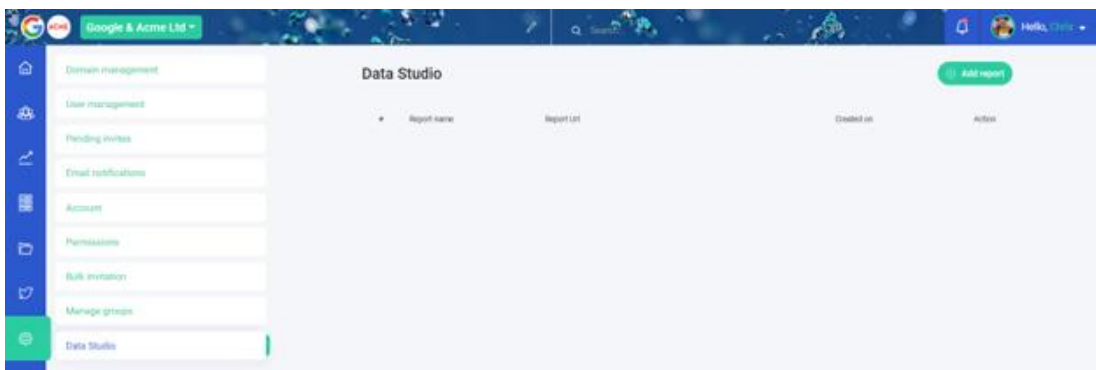


Add reports to Clientshare

Once the report URL is saved to your clipboard, go to the Clientshare account you want to add the report to. You will need admin access to add reports on Clientshare. Please contact support@myclientshare.com or one of the Customer Success Team to enable admin access.

To add a report, go to **Settings > Data Studio**

If **Data Studio** is not on your list, please contact support@myclientshare.com or one of the Customer Success Team to get this turned on. You must be an admin to do this.

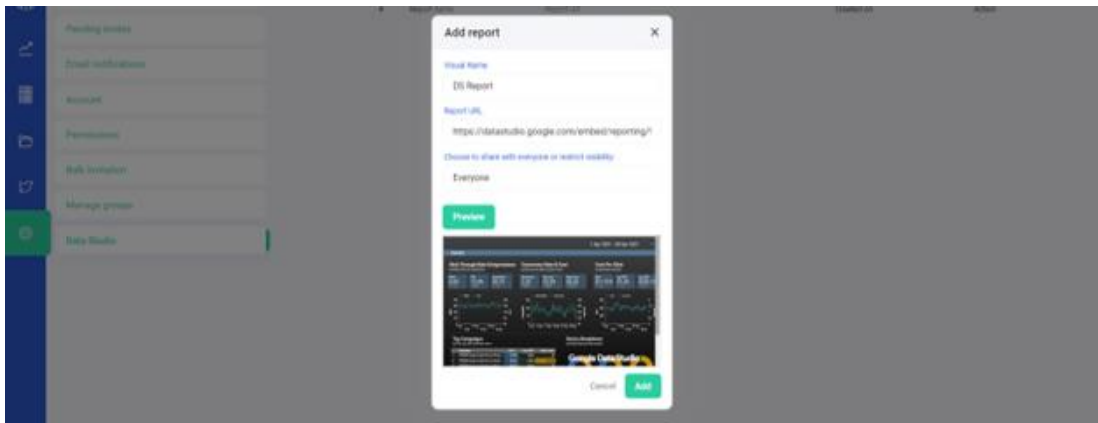


Select **Add Report** (top right of your page).

Fill in the 3 fields to add the report to Clientshare. Give your report a **Visual Name**. It can be the name given on Data Studio. Next, is the **Report URL** which has been saved to your clipboard.

Finally, you can share your report with your accounts **Community** or restrict the visibility to a set number of users. This can be done by creating groups in the **Manage Groups** tab within your **Settings** page.

Before you share the report, select **Preview** to check whether the report will be visible once added and ensure it is the correct report for the account.



Once you have confirmed the information is correct, click **Add**.

The report will save within the **Settings** list. Refresh your page and you will be able to see the Data Studio page on the left-hand side of your account.

