

Requirements: You must have a customer role that includes the Create Customer right.

1. On the home page, click **Administration**.
2. In the **Administration** area, click **Customers**.
3. In the **Customers** area, click **Create Customer**.
4. In the Create Customer window, in the **Customer Info** area, type the customer's name (required), address, and contact information.
5. (Optional) In the **Customer Number** box, type a unique number for this customer.
6. In the left pane, select **Customer CSR**.
7. In the **Customer CSR** area, perform one of the following actions:

To send e-mail notifications to	Do this
All staff users	Select the check box next to CSR Name . A check box appears next to all staff users in the list. When there is activity on this account, the system will send e-mail notifications to all current and future staff users in the system—for example, when a job is created or files are uploaded.
One or more specific staff users	Select the check box beside each staff user who should receive e-mail notifications about activity on this customer account.

Note: Always select at least one staff user as a Customer CSR. If no staff user is selected, e-mail notifications are not sent. You can prevent a Customer CSR from receiving e-mail notifications about a particular job by assigning a Job CSR.

8. (Optional) In the **Additional Email Recipients** area, type the e-mail addresses of other users who should receive e-mail notifications when there is activity on this account. Use a semicolon (;) to separate the e-mail addresses.
9. In the left pane, select **Job Location**.
10. In the **Job Location** area, perform one of the following actions:
 - To create jobs in the default location, as specified in the configuration settings in the InSite Administration software, select **Use default location**.
 - To create jobs in another location, select **Use customer-specific location**, and specify the name of the server and the standard job share on the server. Use the tip-down arrows to select job sub-groups, if applicable.
In *Enterprise*, select the appropriate satellite locations and specify the name of the server and the standard job share on the server.
11. In the **Job Groups** area, in the list, select the job group (on the Kodak Prinergy server) in which you want to place this customer's jobs.
Note: Job Groups can be nested.
12. In the left pane, select **Job Options**.

- a. In the **Auto Generated Job Name** area, select one of the following options:
 - To create jobs that always have automatically generated names, select **Always**, and type a prefix in the **Auto Generated Name Prefix** box.
 - To create jobs that have automatically generated names only when a user does not type a job name, select **Optional**.
 - To create jobs that never have automatically generated names (that is, a user must always type a job name), select **Disabled**.
- b. In the **Approval Workflow** area, in the **Page Approval** list, select the required workflow:

If you do this	The system enables the users to
Select the Always allow option	Users are allowed to approve pages without being asked to.
Select the Allow with warnings option	Users are allowed to approve pages without being asked to, but a warning message is displayed.
Select the Allow only on request option	Users can approve pages only when they were specifically asked to.

- c. In the **Approval Workflow** area, in the **Page Review** list select the required workflow:

If you do this	The system enables the users to
Select the Always allow option	Users are allowed to review pages without being asked to.
Select the Allow with warnings option	Users are allowed to review pages without being asked to, but a warning message is displayed.
Select the Allow only on request option	Users can review pages only when they were specifically asked to.
Select the Turn off option	Page-review workflow options are not displayed.

- d. Select the **Allow Arrange Pages on Production Jobs** option to allow arrange pages on Production jobs.

13. (If licensed) In the left pane, select **Color Management**.

To enable customers to use the color management features in the Smart Review software, select the **Use Matchprint Virtual** check box. In the **Color Target** list, you can select targets to associate with this customer as well as set a default target.

14. In the left pane, select **Job Templates**.

15. To assign Prinergy job templates to Prepress Portal jobs, you must make the job templates available to the customer. Perform the following actions:

- a. In the **Available jobs for** list, select the required customer list.
- b. From the list of available customers, select the check box next to the job templates that you want available for this customer.
In *Enterprise*, from the **Location** menu, select a satellite server.

16. In the left pane, select **Security**.

a. Passwords

i. Select one of the following options:

- To enable customer users to change their own passwords, select the **Allow customer users to change their password** option (default).
- To force customer users to change their passwords at a specified interval, select **Customer users are required to change their password every <xx> days**.

Notes: If you select to force customer users to change their password, you can also enable customers to remind their users to renew the password by:

- ii. Sending the users an e-mail x number of days before the password expiration date.
- iii. Prompting the users to renew the password at login.

b. Two-Factor Authentication

i. Two-Factor Authentication must be enabled on the **InSite Administration Page > Configuration Settings > Security** for this feature to show on the Website.

1. If you would like to Enable all Customer Users in the Customer for 2FA, select **Enable 2FA for all customer users** in the drop-down.
2. If you would like to Disable all Customer Users in the Customer for 2FA, select **Disable 2FA for all customer users** in the drop-down.
3. If you would like no change to the current 2FA behaviour, leave the drop-down at **No Change** (default).

c. Federated Authentication

i. If your customer wants to use Federated Authentication, click the **Enable Federated Authentication** checkbox, and enter the Federation Metadata Endpoint URL in the field below. For more information on Federated Authentication, see Section 7.1.18 in the InSite 11.5 [System Administration Guide](#).

17. In the left pane, select **Preview & Smart Review**.

18. In the **Preview Permissions** area, select the check box next to the required permissions.

19. To create your own Smart Review annotation stamps, under **Smart Review Annotation Stamps**, type each stamp on a separate line.

20. In the left pane, select **Comments**. In the **Comments** box, type a comment if desired.

21. Click **Create**.