domai

PARTNER QUICK START

How your team runs Eidomai for clients.

For account managers and the web person. Read it once. Every page in the portal has a "How do I use this page?" button at the top right.

1. PEOPLE

Three kinds of access. **Owner:** everything, including your rates and billing. **Team:** the accounts you give them, nothing about pricing. **Client view:** one client's overview and battle map, read-only. Each person has their own sign-in link; an Owner adds and removes people from **People**, and removing one changes nobody else. The old shared owner and team links are legacy until an Owner retires them.

2. THE PARTNER HOME

- **Accounts:** every account under your agency with plan, mention rate, last and next scan, open tasks, setup progress and reports. Click one to open its full portal.
- **Add an account:** website, industry, buyer questions if you have them, plan. Setup starts on its own.
- **Prospects:** your prospect scans this month, and "Scan a prospect."
- **Reports:** each month's report, one-page handout and data sheet, with your logo on them.

3. SETTING UP AN ACCOUNT

Every new account shows a six-item checklist at the top until it's done.

ITEM	WHO USUALLY DOES IT
Connect Search Console	Your web person
Connect GA4	Your web person
Finish the context interview	The business owner, ten minutes, in their own words
Confirm or edit the buyer questions	You and the client together
Pick up to five watchlist questions	The account manager
First scan date	Set automatically

The context interview matters most. Every brief and every draft is built from it.

4. THE MONTHLY RHYTHM

- First of the month: the report, the handout and the data sheet are built. Open them from the partner home.
- Read the data sheet before the client meeting. The talking points are on it.
- Hand the client the one-page handout. That's the page that goes on their desk.
- Open the work list. "Start here" marks this month's task. Open the brief, copy the prompt, write the content or send it to whoever writes, run the draft check, fix what it flags, publish, mark it shipped with the address.
- Next month the map re-measures and the month-over-month view shows what moved.

5. WHO SEES WHAT

ACCESS	SEES
Owner (per person)	Every account, everything, including your rates and billing
Team (per person)	The accounts you give them, everything except pricing
Account (the client)	Their account, everything
Client view (per contact)	One client's overview and battle map, read-only

Click an account name to open and manage it: the full portal, the same one the client sees. For a client who wants a dashboard and won't use it, add them under Client contacts on the account row to send their own client view link, or give them only the monthly PDF.

6. IF SOMEONE ELSE WRITES

Work list, Export this month.
One PDF: the work list in order, every open brief, the rules, the copy-ready prompt, your branding. They never see the dashboard. "Export brief" does one task.

7. PROSPECT SCANS

Partner home, Scan a prospect, website.
You get their one-page battle map with your branding: where they show up, where they don't, who AI names instead, what sources the engines use. Take it to the meeting. When they sign, "Convert to account" keeps today's baseline so their first month shows what changed. Five a month, reset on the 1st.

8. CONNECT CLAUDE OR CHATGPT

Any account can be connected to the AI your team already uses. It reads the brief, writes from the verified facts and runs the draft check. The button is in the sidebar of every account.