



# 5 ways Account Center makes managing your clients easy



If you're new to Account Center, take the [quick start tour](#) to get your clients set up — and check out these five ways Account Center helps you manage your clients with ease.

1

## **Stay organized by centralizing your client management**

Manage users, products, and see account alerts from the single source of truth that is Account Center. Gain a unified view of all your clients using CallRail products.

2

## **Add value by suggesting additional products and services**

Account Center's all-in-one dashboard shows which CallRail products your clients are currently using. Easily identify clients that could benefit from any CallRail product so you can reach out to suggest a free trial.

3

## **Gain instant visibility into the health of your clients' accounts**

A centralized view of each client's account health helps you quickly spot those that require additional assistance so you can proactively offer support — without the need to toggle between multiple accounts.

4

#### Manage clients' billing from one place

See your clients' CallRail plans, current spend, invoice dates, payment status, and even trial expiration dates. Easily track and manage all billing tasks from one place.

5

#### Access data-driven reports at-a-glance

Track your clients' usage and monitor each customer's inbound, outbound, answered, missed, and qualified calls. Instantly see the number of first-time callers across all your accounts.



## Ready to level up your client management approach?

Get up and running in Account Center with this [quick start tour](#) or visit our [Account Center support hub](#) for more information.

