Creating Sub-Clients

When to use: If the client needs to set up and manage sessions at separate client levels, typically for generating separate reports for each group or for billing purposes. Creating a sub-client will separate the sessions and data for each group.

Log into MAX

1) Navigate to https://www.tracommax.com/
2) Enter your **USERNAME** and **PASSWORD.**
3) Click **LOGIN.**

Navigate to the Clients tab

1) Under the **CLIENTS** tab, click **Add Client.**

Add a New Client

1) Select the "parent" or client level under which you would like to add the sub-client. You can add a sub-client to any existing client level.
2) After you click on the desired client, click **Yes** to confirm the placement of the new client.

Client Settings

1) In the **CLIENT INFORMATION** section add the Client Name – this will be the name of the company or group for the sub-client. This name will appear on the Learner Profile Reports.
2) In the **CONTACT INFORMATION** section add the required client Email, First Name, and Last Name. Note – Emails will not be sent to client contacts based on their addition in these fields.
3) Click **Save.**

Client Products

Any product authorized under the parent client Level will be authorized at the new sub-client. In order to set up a session and enroll learners under the new sub-client, you will need to transfer Pool Quantity to the new client level. (see Transfer Pool Quantities Between Clients Quick Step for instructions)

For further questions, please email support@tracom.com.

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