

**The steps required to begin working with Customer Monitor:**

- 1. Create a maintainer access to the CM portal** - The creation is performed at [Try CM](#) [1]. Overview of a maintainer account's functions is described in the section [Access roles >> Maintainer](#) [2].
- 2. Initial settings of CM portal** - will be prompted automatically after login to the CM Portal. Read more about initial settings in the section [CM Portal >> Initial settings of CM portal](#) [3].
- 3. Adjust Helpdesk** - description of Helpdesk settings is in the section [Helpdesk Customer Desk](#) [4]. Contact us for optimal configuration in your company, the presentation regarding (not just) Helpdesk in CM, will be of your benefit.
- 4. Create first company (customer) in the CM portal** - read more about creating a company (customer) in the section [Creation of customer](#) [5].
- 5. Create operator accounts and access for customers** - procedure of creation of an operator account is described in the section [Operators and groups](#) [6] and creation of a customer account is described in the section [Customer account](#) [7]
- 6. If you're going to use technical functions of CM, install the C-Monitor clients (for Win, OS X, Linux/FreeBSD) - procedure for installation of clients to computers, as well as supported OS versions are described in sections** [C-Monitor Windows client](#) [8], [C-Monitor Linux client](#) [9] and [C-Monitor \(Mac\) OS X client](#) [10]

**After fulfilling steps 1-5, the system is ready for :**

- Work with helpdesk Customer Desk
- Manual hardware evidence

**After fulfilling step 6, the system is ready for :**

- View of computers data (HW configurations, installed software, selected OS setting)
- Online information for the past 48 hours - such as loading of CPU, RAM, network adapters etc.
- Notifying about incorrect standard parameters (based on samples 1x a day), such as low drive space, suspicious faulty disk, not updated antivirus, not updated OS Windows etc.

**Next, we recommend you to set and process in the nearest step :**

- Create customer accounts
- Set authorizations for Operators (i.e. remote access to a PC desktop, remote installations...)
- Set online monitoring of availability of critical computers (mostly servers)
- Set Backup
- Set Online Monitoring Watches (i.e. free space on disk, network connections...)
- Process the first SW audit, report about configuration and status of computers

**Procedures of the settings and descriptions of other functions are listed in other articles of [How CM works](#) [11].**

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**Links**

[1] <https://customermonitor.co/i-am-interested-cm/try-cm>

[2] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-0>

[3] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/cm-server-installation/initial>

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- [4] <https://customermonitor.co/how-cm-works-0/helpdesk-customer-desk>
  - [5] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/creation-customer>
  - [6] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-1>
  - [7] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/cm-server-cm-portal/roles-access-cm-portal-and-2>
  - [8] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/c-monitor-windows-client>
  - [9] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/c-monitor-linux-client>
  - [10] <https://customermonitor.co/how-cm-works-0/components-and-architecture-cm/c-monitor-mac-os-x-client>
  - [11] <https://customermonitor.co/how-cm-works-0>