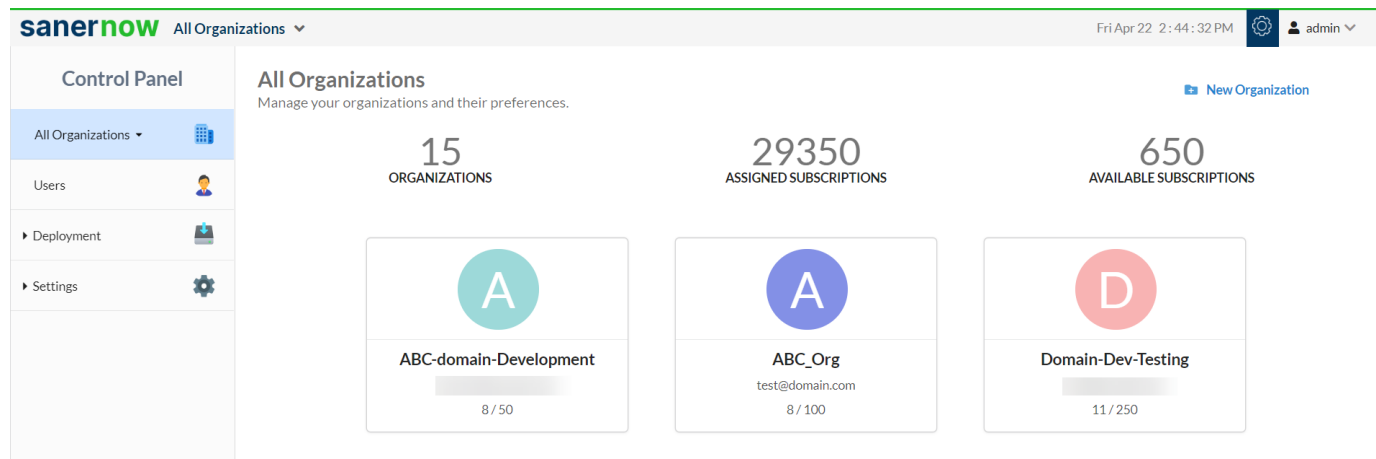


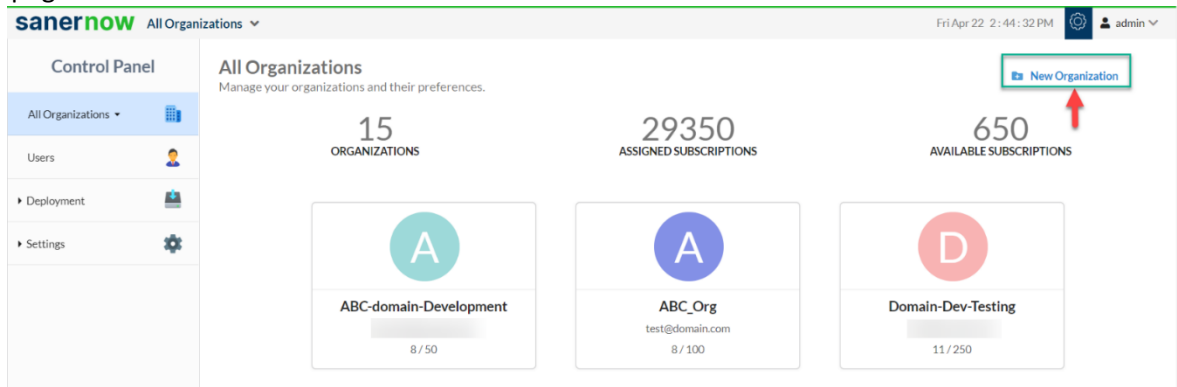
## Organization Management

Organization Management allows you to manage Organizations/Accounts and associated settings. The number of organizations, assigned subscriptions, and available subscriptions utilized are all displayed on the **All Organizations** page.



To create a new organization, follow the below steps:

1. Click on the **New Organization** from the **All Organisations** section on the control panel page.



2. The **Onboard your organization** page will appear, as shown in the below image.

Onboard your Organization

Organization Name (\*)

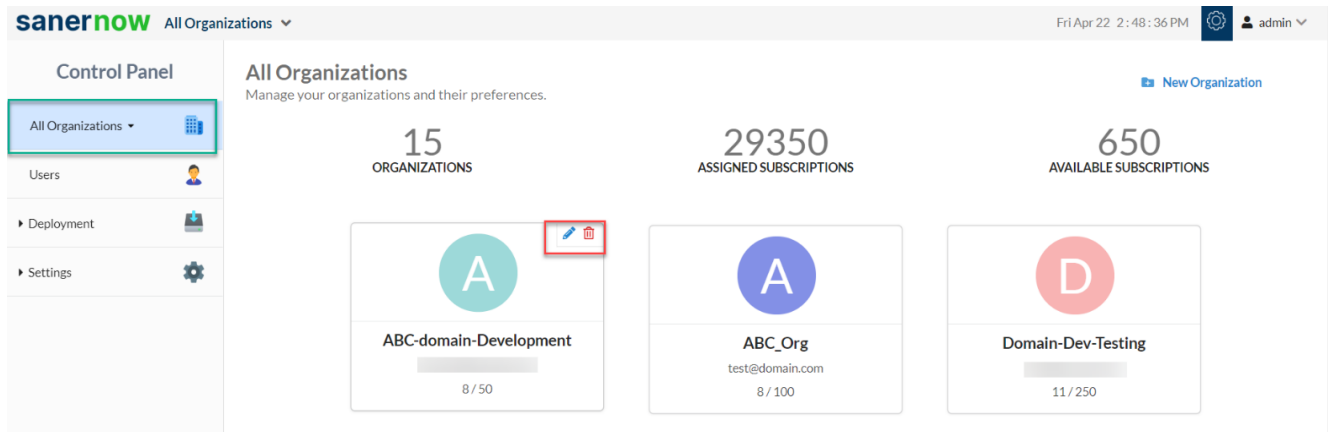
Allowed Subscriptions (\*) (Available Subscriptions : 0)

Expiry Date (\*)

Tools Provision

<input type="checkbox"/> Vulnerability Management	<input type="checkbox"/> Patch Management
<input type="checkbox"/> Asset Exposure	<input type="checkbox"/> Compliance Management
<input type="checkbox"/> Endpoint Management	<input type="checkbox"/> Endpoint Query Response

- Specify the organization name, allowed subscriptions, expiry date, and tools to be provisioned in the respective fields and click on the **Onboard** button.
- A number of subscriptions count will be 10 for the free evaluation plan. Once the organization is created successfully, it will appear on the **All Organizations** page.



- Move the cursor on each organization to edit or delete the organization. Click on the **Delete** icon to remove the organization; all the gathered data will be lost by deleting the organization. Click on the **Edit** icon to modify the organization, make the necessary changes and click on the **Update** button.

#### Modify Organization Preferences

Organization Name (\*)

Email Id (\*)

Organization Identity



[Choose image](#)

Allowed Subscriptions (\*) ( Available Subscriptions: 0)

Expiry Date (\*)

Provision Tools (\*)

Vulnerability Management

Patch Management

Asset Exposure

Compliance Management

Endpoint Management

Endpoint Query Response

Cancel

Update

## Account Management

SanerNow is a multi-tenant solution. As an MSP, users can manage multiple accounts from SanerNow. By default, the account will be created for the organization. You can modify the default account name or create a new account.

The screenshot shows the Accounts management interface. On the left is a sidebar with 'Control Panel' and navigation options like 'Users', 'Deployment', and 'Settings'. The main area is titled 'Accounts' and includes a 'New Account' button. It displays three summary statistics: 1 Account, 0 Assigned Subscriptions, and 28654 Available Subscriptions. Below these is a search bar and a table listing account details. The table has columns for Account Name, Email Id, Subscription, Expiry Date, and Action. One account is listed: '\_Default.XYZORG' with email 'admin@domain.com', 0 subscriptions, and 287 days left. The Action column contains icons for mail, edit, delete, and refresh. A pagination bar at the bottom indicates 'Showing 1 to 1 of 1 entries'.

The Accounts page provides the following information:

- The Total number of accounts.
- The Total number of assigned subscriptions.
- The Total number of available subscriptions.
- Account Name, Email ID, number of subscriptions allotted to a particular account, Expiry date, and Action column. Users can mail, edit, delete, and directly dive into the account from an Action column.

---

*Note: Admin and Org admin can only add accounts based on the number of subscriptions. A new account cannot be added if the total number of subscriptions is exhausted.*

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**To add a new account, follow the below steps:**

1. Click on the **Control panel** icon on the top right corner of the organization level dashboard and select the organization from the drop-down under which you want to create an account.
2. Click on the **New Accounts** option and enter the account name and an email ID to uniquely identify the account, the number of subscriptions you want to assign to this account, and the expiry date of the subscriptions.
3. You can choose **Auto Increment** or **Custom**; you need to enter the allowed subscriptions manually if you select Custom.
4. By enabling the **Agent auto update** option, you can automate the updating of the agent.
5. By enabling the **Password Protect Agent** option, you can protect the agent.
6. When Password Protect Agent is enabled, you must enter the agent uninstall password and then re-enter the password.

7. If a user tries to uninstall the Saner agent using the command line, the user must enter the password.
8. Click on **Create** button to set up a new account.

New Account

---

Account Name (\*)

Email Id (\*)

Allowed Subscriptions (\*) ( Available Subscriptions: 28654 )  
 Auto Increment  Custom

Agent auto update

Password protect agent

Agent Uninstall Password   
 Re-Enter password

**To modify an existing account, follow the below steps:**

- Click on the **control panel** icon on the top right corner of the organization level dashboard and select the organization under which you want to modify an account.

**Accounts** [New Account](#)  
 Manage your accounts and their preferences

**1**  
ACCOUNTS

**0**  
ASSIGNED SUBSCRIPTIONS

**28654**  
AVAILABLE SUBSCRIPTIONS

Search:

Account Name	Email Id	Subscription	Expiry Date	Action
_Default.XYZORG	admin@domain.com	0 Used (Auto Increment)	287 days left	<div style="border: 1px solid red; padding: 2px;"> <input type="button" value="✉"/> <input type="button" value="✎"/> <input type="button" value="✖"/> <input type="button" value="➕"/> </div>

Showing 1 to 1 of 1 entries Previous **1** Next

**Modify Account**

- From the Accounts table, click the **Edit** icon in the Action column for the accounts to be modified.
- Update the necessary changes and click **Update**.

Modify Account Preferences

---

Account Name (\*)

Email Id (\*)

Used Subscriptions

Allowed Subscriptions (\*) (Available Subscriptions: 92)  
 Auto Increment  Custom  ⓘ

Expiry Date (\*)

Agent auto update

Password protect agent

Provision Tools (\*)

<input type="checkbox"/> Vulnerability Management	<input type="checkbox"/> Patch Management
<input type="checkbox"/> Asset Exposure	<input type="checkbox"/> Compliance Management
<input type="checkbox"/> Endpoint Management	<input type="checkbox"/> Endpoint Query Response

**Delete Account:**

- From the Accounts table, click the **Delete** icon in the Action column of the account to be deleted.

**Dive into Account:**

- From the Accounts table, click the **dive into account** icon, which appears in green color for direct access to your account and tools

**Mail Settings:**

- Refer **Configuring Mail Settings** section for more details.