SMARTMESSAGES

Multiple Account Setup

Multiple Account Management Guide

With a simple two-tier, parent–child account structure, giving larger organisations and digital agencies a wide range of features to manage Smartmessages services across multiple clients or departments.

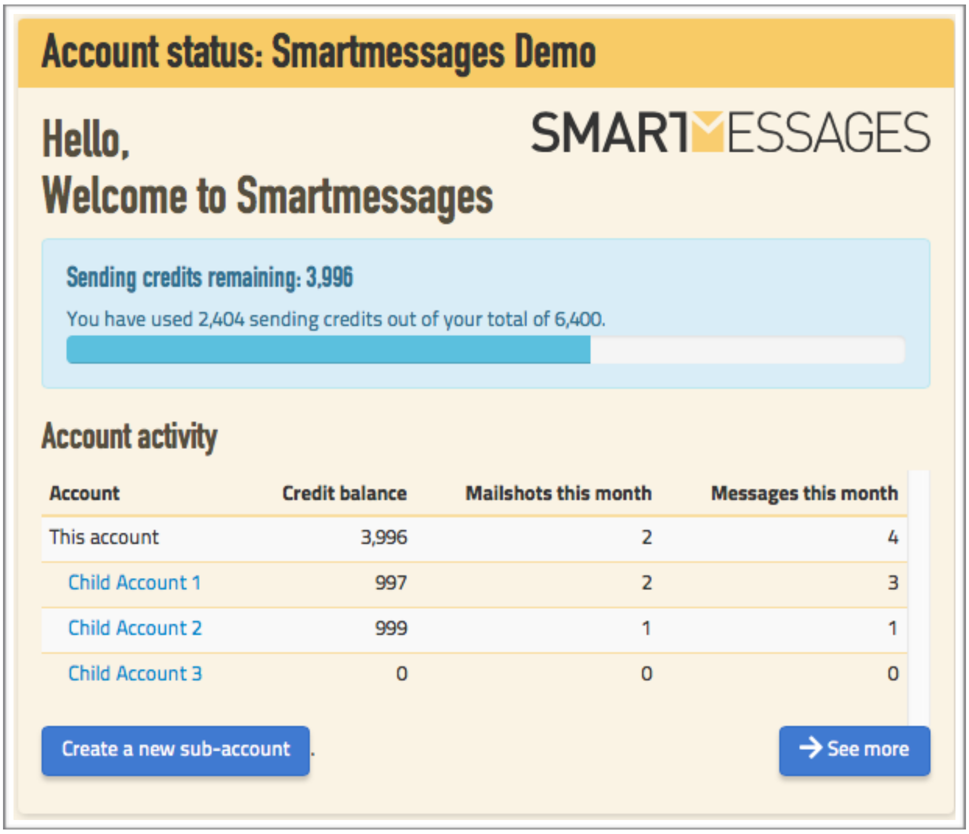
These features save time, create autonomy and give oversight by giving email credit control, user role control, management overview of all child accounts, template sharing from the parent account and automatic branding on emails and public facing pages from the current account details.

Setting up Accounts

New child accounts can be created with a click. All the account admins with user management privileges are copied to the child account on account creation.

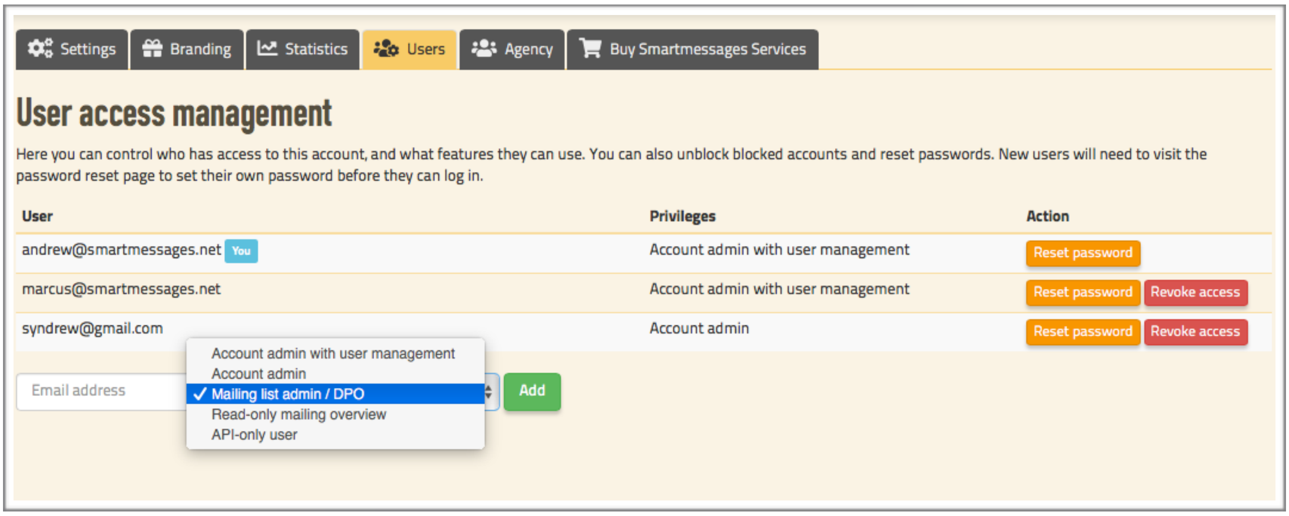
On the home page of the parent account, the child accounts are listed, helping with navigation and oversight.

Also on the parent account under the **Account tab,** there is the **Agency tab**, where you can see an overview of all the child accounts, their credits, their sending and a link to the accounts.



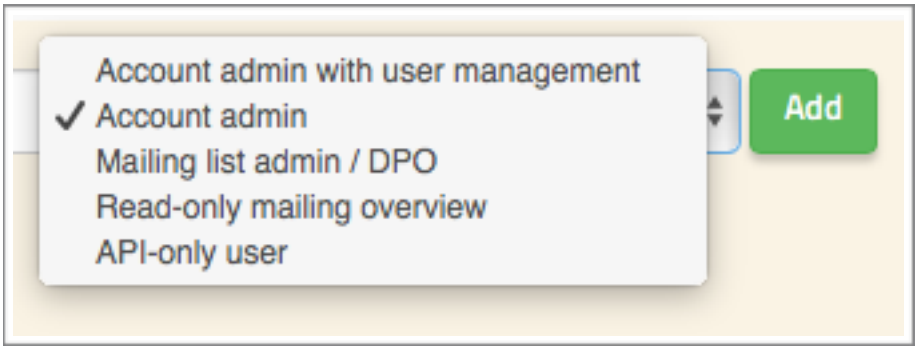
User Management

Administrators can add new users and allocate them different levels of access appropriate for their role. They can reset forgotten passwords as well as revoke access when needed.



There are five different privilege choices:

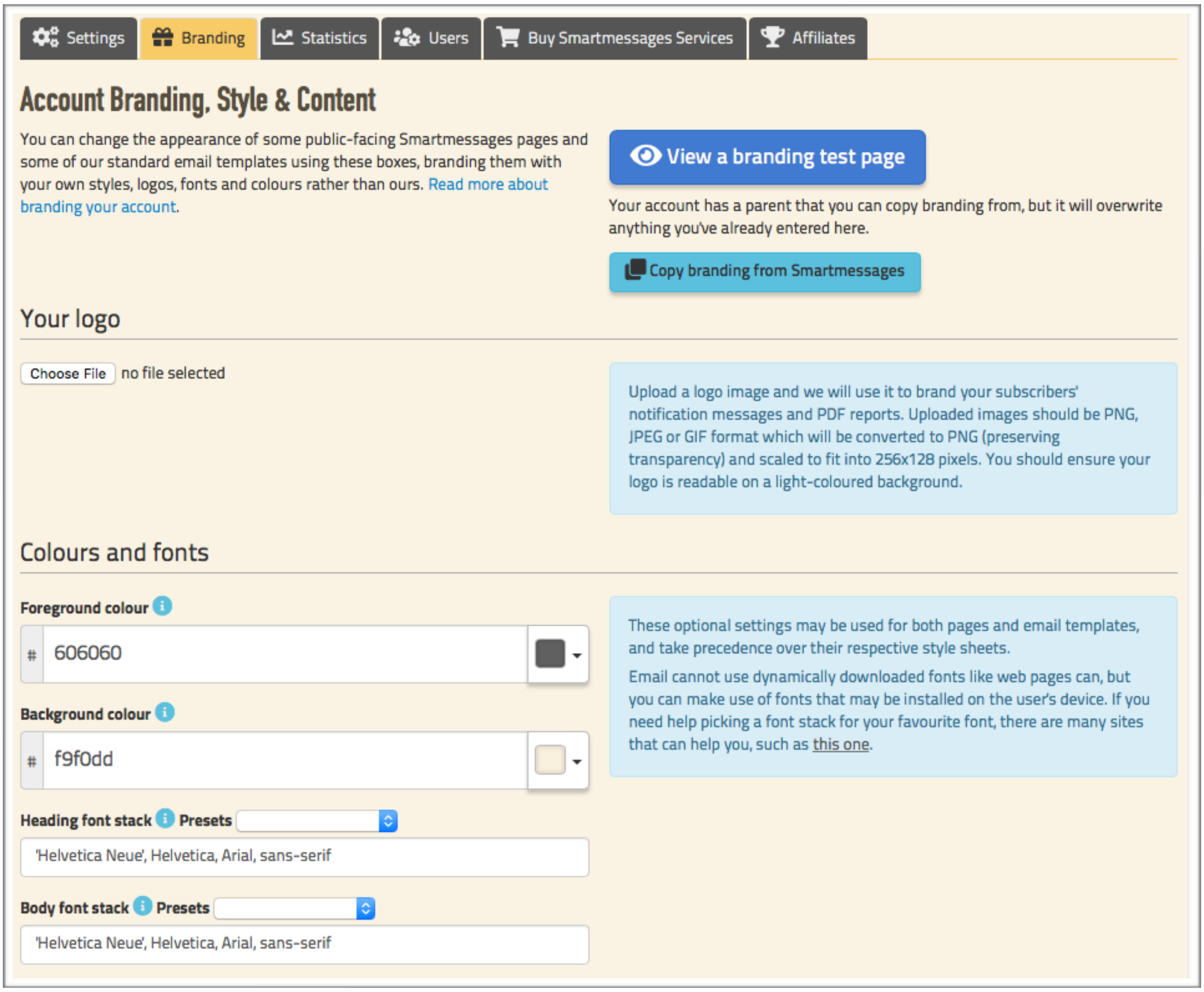
- Account Admin with user management – can do everything as well as create users
- Account Admin – can do everything
- Mailing List Admin/DPO – Contact Management but cannot send
- Read only mailing overview – Can only see the reports of mailings
- API-only user – used when connecting systems together



Account Branding

A parent account's branding can be copied to a child account in one click , thus keeping the styling consistent across an organisation, saving lots of copying and pasting.

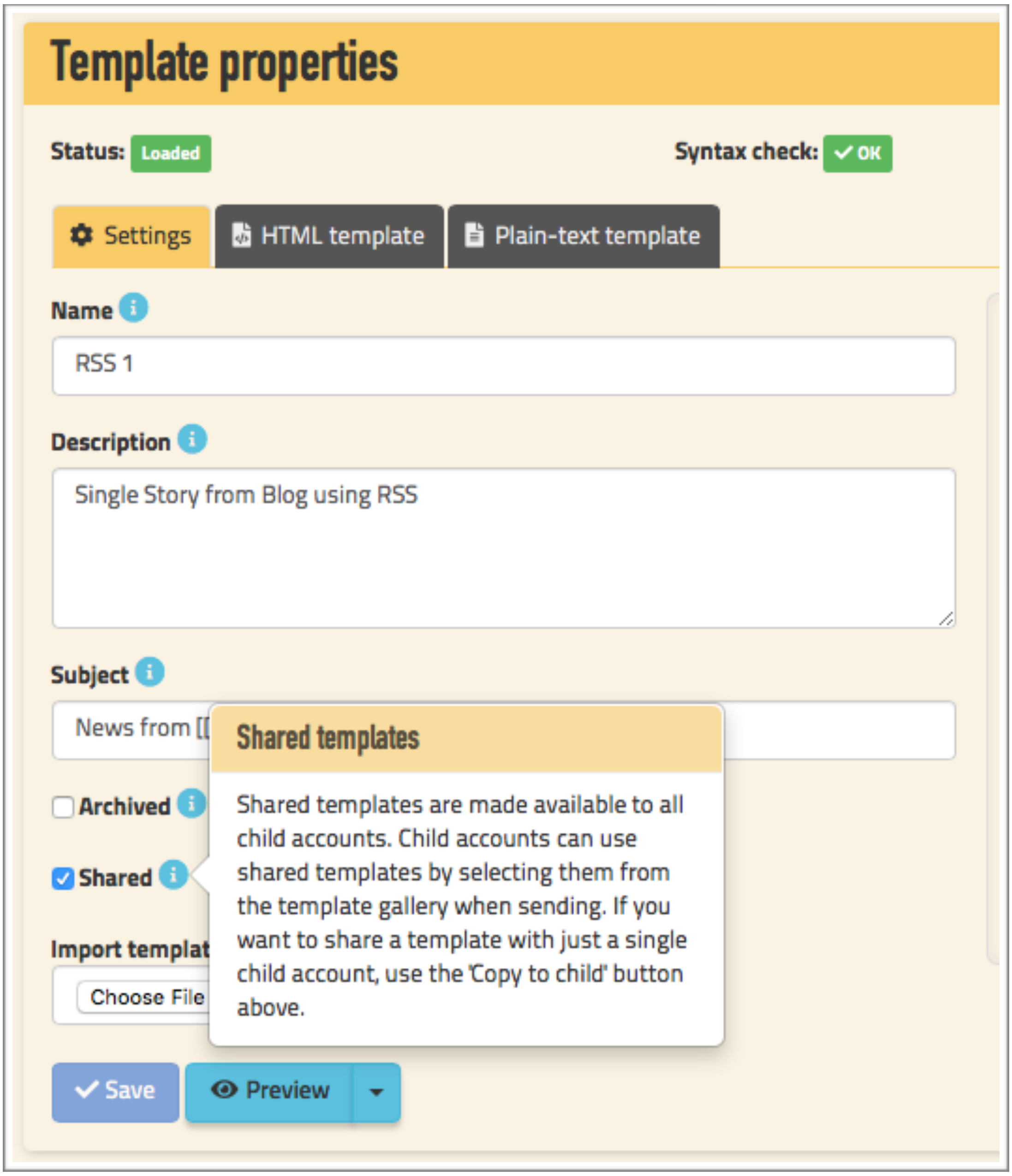
Branding controls cover the colour scheme, font stacks, custom headers & footers, and CSS for public-facing pages, such as subscribe and unsubscribe.



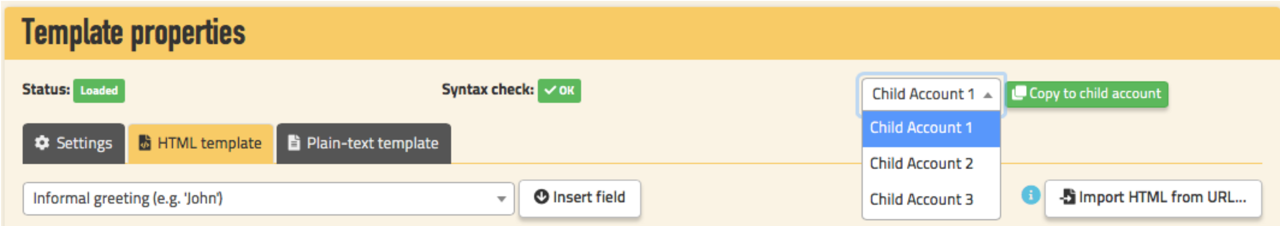
Template Features

Templates can be imported from other email marketing systems with a couple of clicks, written from scratch (we don't get in the way of custom template developers), or they can be created from the standard templates.

Our standard templates pull information from the account, such as branding, colours, logos, company contact details, and social media links without needing additional work, so they act as a great starting point for good-looking templates with no effort.
A template in the parent account can be shared with all the child accounts which will inherit their branding from their own account and thus simplifying production and control of templates.



If the template needs to be only used in one of the child accounts, it can be copied there from the template properties in the template module of the parent account. Click on the drop down menu, choose the child account to copy to and hit the copy button.



Account Overview

The agency module creates a single page where the parent account can see an overview of all the child accounts. The information provided shows the credits allocated and the sending history with grand totals for all the accounts.

Email Credits

- Email Credits can be bought in chunks and spread out to the child accounts by the administrator as well as remove credits from them.
- These credits last for a year and will expire if they are not used.
- The system counts down the credits as they are used.
- When purchasing credits, the cost per credit comes down the larger the chunk.
- Credits can be distributed to multiple child accounts with ease.