

Creating a New Sub Account





Your SnailWorks account supports a **reseller structure**. Sub - accounts allow you to provide your clients with access to their mailings and no others.



Adding a New Sub Account



Via One-Step

One-Step will create new accounts as jobs are added to your SnailWorks account, you do not need to add them manually.



Via The Web

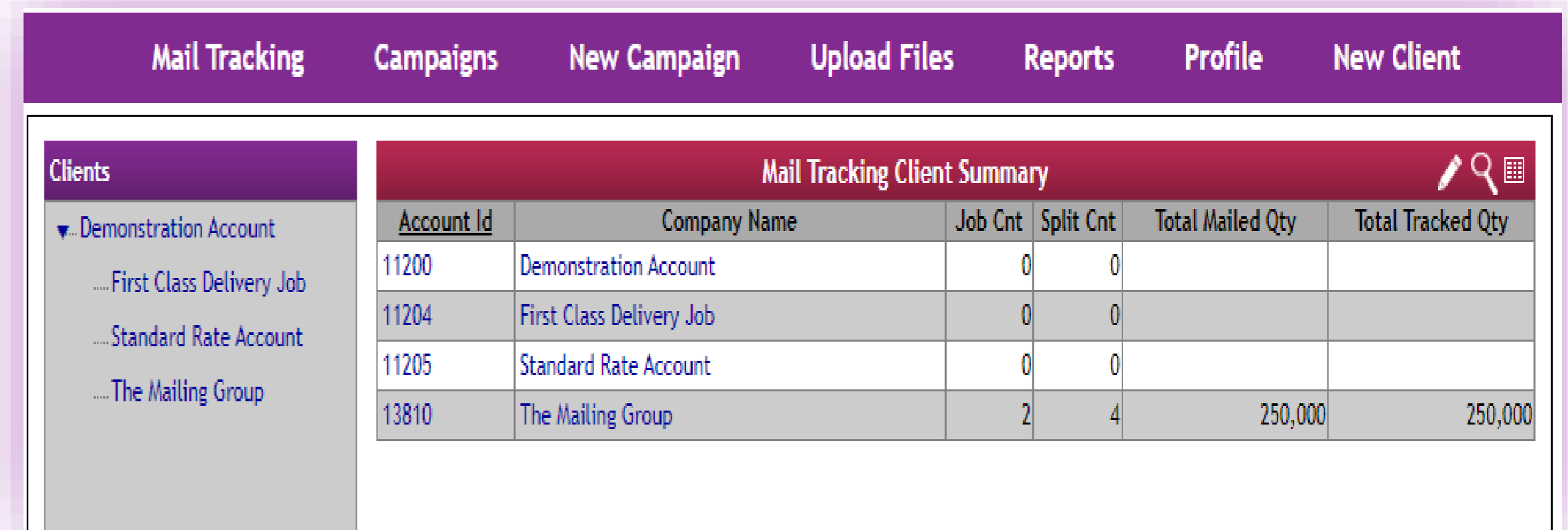
If you are creating your mail tracking jobs through the SnailWorks website you will need to add a new sub-account from the web site.

If you are a One-Step user, please refer to your One-Step Guide for details on adding a new account.



Creating a New Sub Account

Click the **New Client** button at the top of your dashboard.



The screenshot shows a dashboard with a purple header containing navigation buttons: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. A blue arrow points to the 'New Client' button. Below the header is a 'Clients' sidebar and a 'Mail Tracking Client Summary' table.

| Mail Tracking Client Summary | | | | | | |
|------------------------------|--------------------------|---------|-----------|------------------|-------------------|--|
| Account Id | Company Name | Job Cnt | Split Cnt | Total Mailed Qty | Total Tracked Qty | |
| 11200 | Demonstration Account | 0 | 0 | | | |
| 11204 | First Class Delivery Job | 0 | 0 | | | |
| 11205 | Standard Rate Account | 0 | 0 | | | |
| 13810 | The Mailing Group | 2 | 4 | 250,000 | 250,000 | |

Creating a New Sub Account

Add your client's name to the Company name field.

Select reseller client in the Account Type drop down.

Scroll to the bottom of the page and **click** save.

Mail Tracking Campaigns New Campaign Upload Files Reports Profile New Client

Add / Edit Company

Company Name:

Account Type: --Choose One--

Virtual Parent Company: Demonstration Account

Client Type: All - SnailWorks & Mail Tracking

Remote Login Key:

Mailing/Shipping Address

Contact Name:

Street:

Address Line 2:

Company Users YourMail

Mail Tracking Preferences

Preferred Page: View By Map

User-defined Column Labels

| UDC | Enabled | Label |
|-----|--------------------------|----------------------|
| 1 | <input type="checkbox"/> | <input type="text"/> |
| 2 | <input type="checkbox"/> | <input type="text"/> |
| 3 | <input type="checkbox"/> | <input type="text"/> |
| 4 | <input type="checkbox"/> | <input type="text"/> |
| 5 | <input type="checkbox"/> | <input type="text"/> |

Save

Date Created:
Date Modified:

[Unmatched Scans](#)
[Scan Volume By MID](#)

Creating a New Sub Account

Your **new account** now is displayed in your listing of accounts.

| Mail Tracking Client Summary | | | | | | |
|------------------------------|--------------------------|---------|-----------|------------------|-------------------|--|
| Account Id | Company Name | Job Cnt | Split Cnt | Total Mailed Qty | Total Tracked Qty | |
| 11200 | Demonstration Account | 0 | 0 | | | |
| 11204 | First Class Delivery Job | 0 | 0 | | | |
| 15921 | Newly Added Client | 0 | 0 | | | |
| 11205 | Standard Rate Account | 0 | 0 | | | |
| 13810 | The Mailing Group | 2 | 4 | 250,000 | 250,000 | |

Closing Reminder

One-Step users do not need to add new account the application will do that for you!



QUESTIONS?

We love to hear
from our clients!



SNAILWORKS

Direct Mail Insights & Solutions



customerservice@snailworks.com



Phone: 855-697-6245



4510 Buckeystown Pike,
Frederick, MD 21704



snailworks.com

