

# Adding A New User



**SNAILWORKS**  
*Direct Mail Insights & Solutions*

# Adding A User To Your SnailWorks Account



Your Master  
SnailWorks  
Account

These users will have full access to your SnailWorks account including the ability to add and edit jobs. They are given “administration” rights.



A Specific  
Sub-Account

These users will only be able to access and view only jobs within a specific sub-account. They are given “regular” rights.

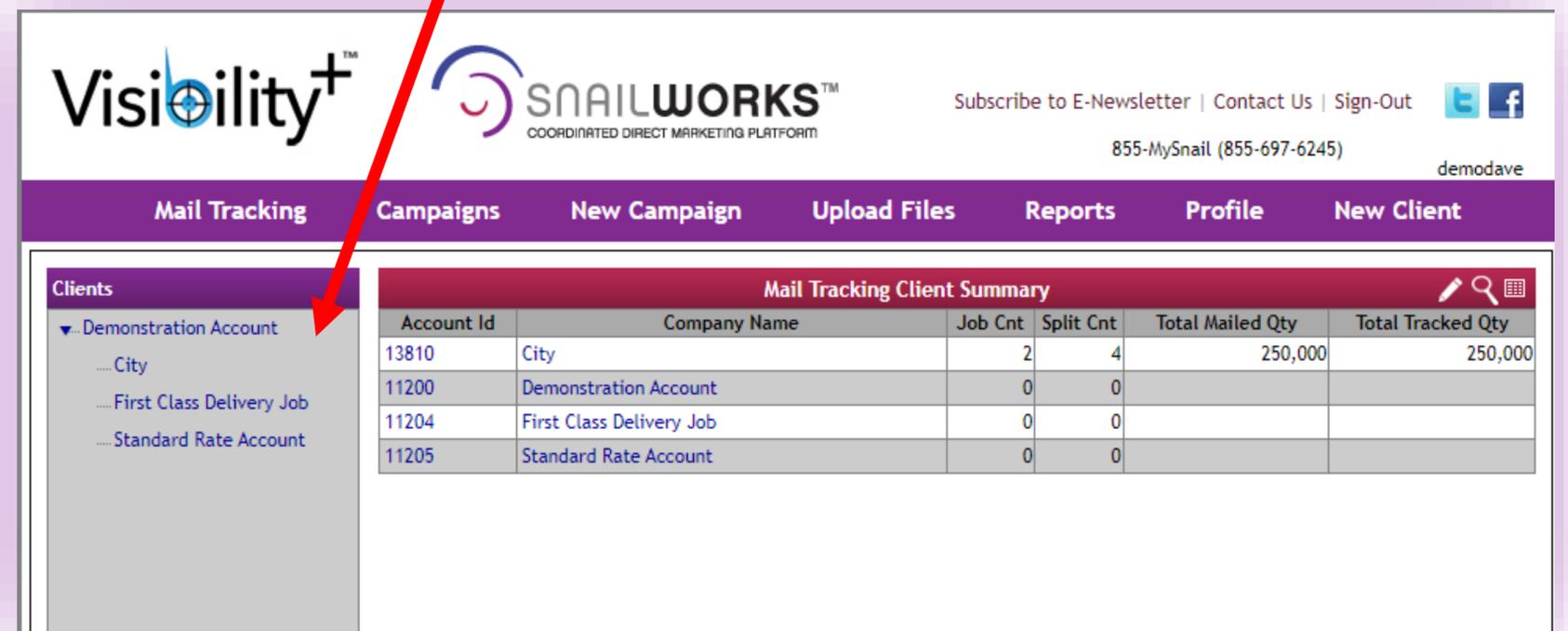


A Vendor

These users are only able to add jobs and review the jobs they have added to your account. They are given “vendor” rights.

# Adding A New User

1. **Sign into** your SnailWorks account.
2. **Select the account** for adding your new user.



The screenshot displays the SnailWorks web application interface. At the top, there are logos for 'Visibility+' and 'SNAILWORKS™ COORDINATED DIRECT MARKETING PLATFORM'. Navigation links include 'Subscribe to E-Newsletter | Contact Us | Sign-Out' and social media icons for Twitter and Facebook. A phone number '855-MySnail (855-697-6245)' and a user name 'demodave' are also visible.

The main navigation bar contains the following items: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client.

The 'Clients' dropdown menu is open, showing the following options:

- ▼ Demonstration Account
- .... City
- .... First Class Delivery Job
- .... Standard Rate Account

The 'Mail Tracking Client Summary' table is displayed below the dropdown. It has the following columns: Account Id, Company Name, Job Cnt, Split Cnt, Total Mailed Qty, and Total Tracked Qty.

Account Id	Company Name	Job Cnt	Split Cnt	Total Mailed Qty	Total Tracked Qty
13810	City	2	4	250,000	250,000
11200	Demonstration Account	0	0		
11204	First Class Delivery Job	0	0		
11205	Standard Rate Account	0	0		

# Adding A New User

**Edit account** by clicking on pencil icon in the right side of red bar.

The pencil icon is your edit tool throughout the SnailWorks site.

A screenshot of the SnailWorks web application interface. The top navigation bar is purple and contains the following menu items: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, New Client, and Admin. The main content area shows a table titled "Mail Tracking - Jobs - City". The table has columns for Company, Job Id, Job Name, Job/Split Description, Type, Class, PT, ACS, ID, Mail Date, Mailed, Tracked, Scans, and Scan %. Two rows of data are visible. A red arrow points to a pencil icon in the top right corner of the table, which is used for editing. The table also includes a search bar and a dropdown menu for "Delivery Date".

	Company	Job Id	Job Name	Job/Split Description	Type	Class	PT	ACS	ID	Mail Date	Mailed	Tracked	Scans	Scan %
+	City	266506	Primary Round 2		R	M	L			03/12/20	50,000	50,000	14,258	28.52%
+	City	258666	2020 Primary		R	M	L			02/07/20	75,000	75,000	22,228	29.64%

Displaying rows 1 to 2 of a total of 2 rows

# Adding A New User

Click on “Users” tab in the company tab.

Be sure the Company Name field is for the company you intend to add your new user!

A screenshot of the SnailWorks web application interface. At the top, a purple navigation bar contains the following menu items: Mail Tracking, Campaigns, New Campaign, Upload Files, Reports, Profile, and New Client. Below this is a main content area with a purple header for the 'Add / Edit Company' form. The form is divided into two sections: 'Company' and 'Mailing/Shipping Address'. The 'Company' section includes the following fields: Company Name (text input with 'City' entered), Account Type (dropdown menu with 'Reseller Client' selected), Parent Company (dropdown menu with 'Demonstration Account' selected), Virtual Parent Company (dropdown menu with '-- Choose Client --' selected), Client Type (dropdown menu with 'All - SnailWorks & Mail Tracking' selected), and Remote Login Key (text input). The 'Mailing/Shipping Address' section includes: Contact Name (text input), Street (text input), Address Line 2 (text input), and City (text input). On the right side of the form, there is a vertical tabbed interface with three tabs: 'Company', 'Users', and 'YourMail'. The 'Users' tab is currently selected and highlighted. A red arrow points from the top right corner of the slide towards the 'Users' tab.

# Adding A New User

**Click on the Add New User** button and complete user profile form.

Don't forget to click "save" once the form is complete.



**Add / Edit User**

Company: City

Users: -- Choose User --

UserName:

Password:

User Level: Regular

Email:

First Name:

Last Name:

Phone:

Mobile Phone:

Date Created:  
Date Modified:

Company  
Users  
YourMail

A red arrow points from the top right towards the 'Add New User' button in the form.

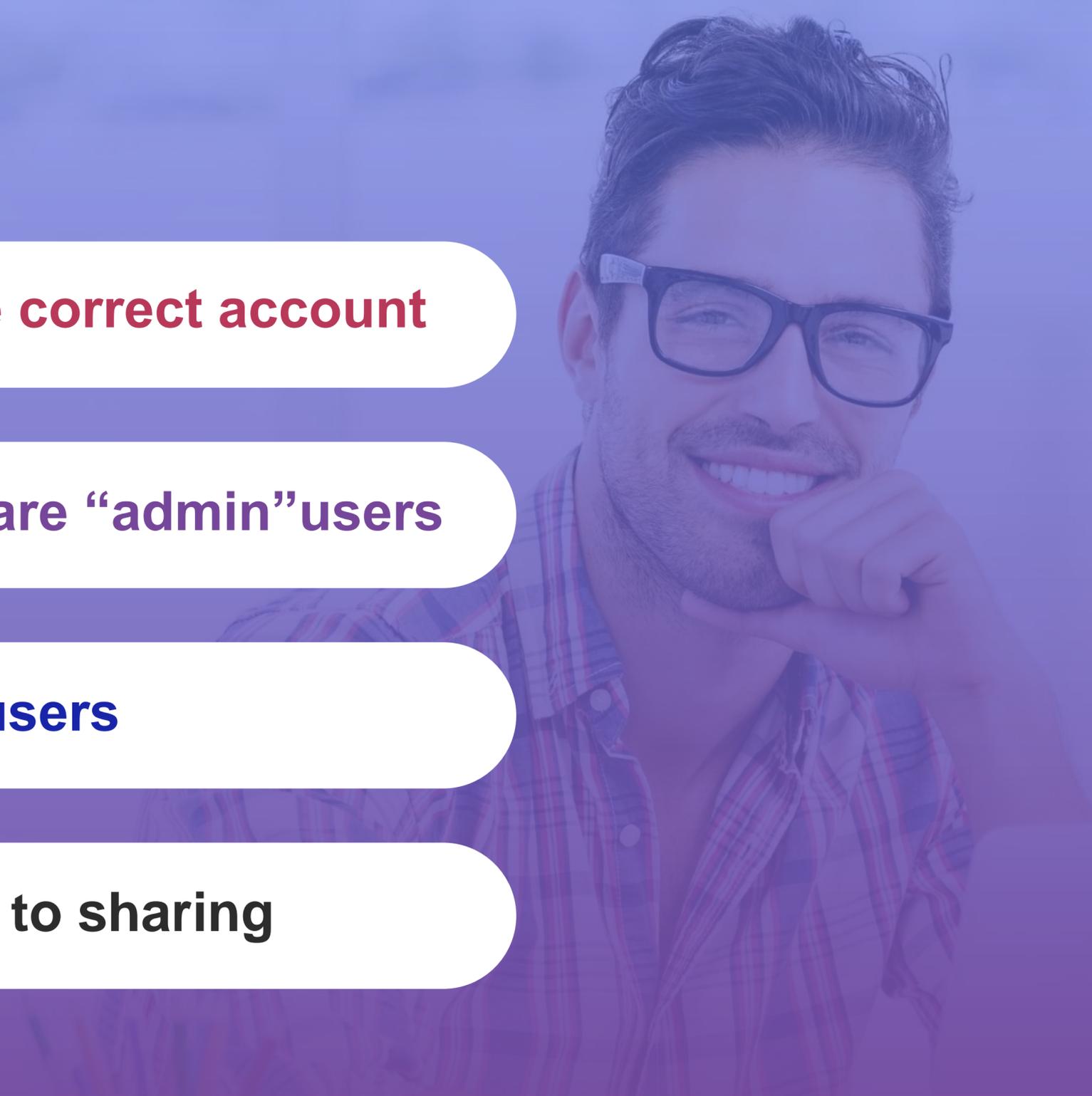
# Tips To Remember

**Ensure you've selected the correct account**

**Your company employees are "admin" users**

**Your clients are "regular" users**

**Test login credentials prior to sharing**



QUESTIONS?

We love to hear  
from our clients!



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