

# Multiple Account Setup



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# 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.

Account status: Smartmessages Demo

Hello,  
Welcome to Smartmessages

SMARTMESSAGES

Sending credits remaining: 3,996

You have used 2,404 sending credits out of your total of 6,400.

Account activity

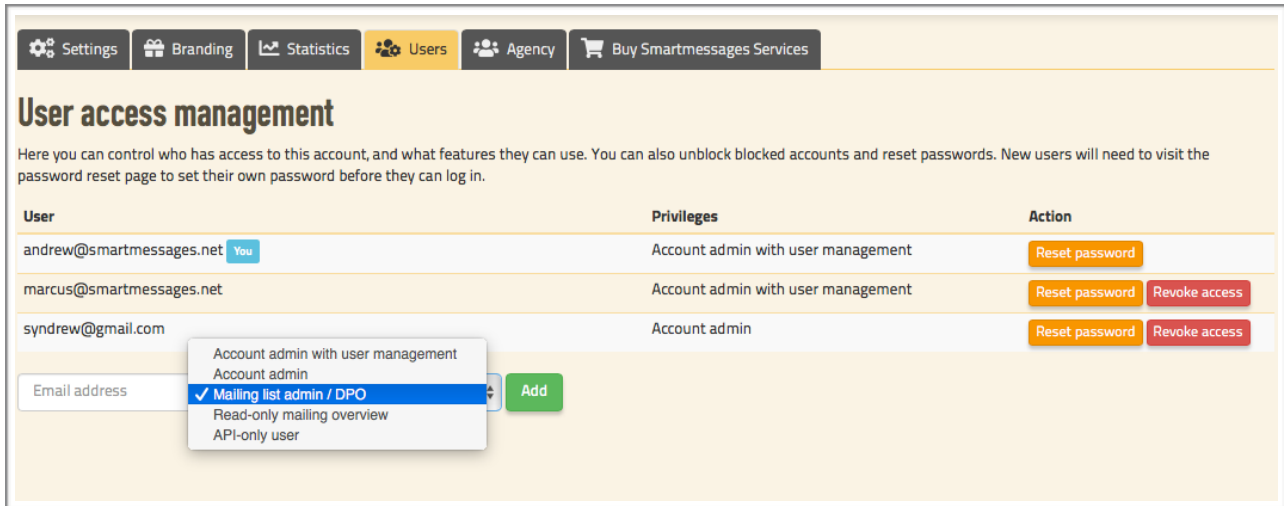
Account	Credit balance	Mailshots this month	Messages this month
This account	3,996	2	4
Child Account 1	997	2	3
Child Account 2	999	1	1
Child Account 3	0	0	0

Create a new sub-account

→ See more

## 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.



The screenshot shows the 'User access management' section of a web application. At the top, there is a navigation bar with tabs: Settings, Branding, Statistics, Users (active), Agency, and Buy Smartmessages Services. Below the navigation bar, the title 'User access management' is displayed, followed by a brief description: 'Here you can control who has access to this account, and what features they can use. You can also unblock blocked accounts and reset passwords. New users will need to visit the password reset page to set their own password before they can log in.'

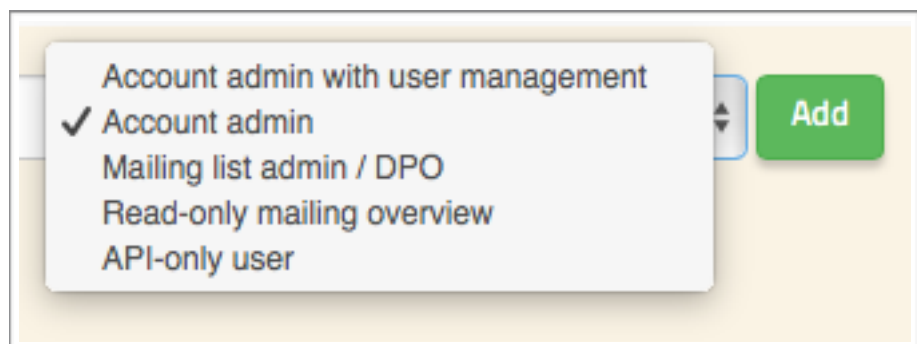
User	Privileges	Action
andrew@smartmessages.net <span>You</span>	Account admin with user management	<span>Reset password</span>
marcus@smartmessages.net	Account admin with user management	<span>Reset password</span> <span>Revoke access</span>
syndrew@gmail.com	Account admin	<span>Reset password</span> <span>Revoke access</span>

Below the table, there is a form to add a new user. It includes an 'Email address' input field, a dropdown menu for selecting privileges, and an 'Add' button. The dropdown menu is open, showing the following options:

- Account admin with user management
- Account admin
- ☒ Mailing list admin / DPO
- Read-only mailing overview
- API-only user

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



This image is a close-up of the privilege selection dropdown menu from the previous screenshot. It shows the same five options: 'Account admin with user management', 'Account admin' (which is selected with a checkmark), 'Mailing list admin / DPO', 'Read-only mailing overview', and 'API-only user'. To the right of the dropdown is a green 'Add' button.

## 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.

SettingsBrandingStatisticsUsersBuy Smartmessages ServicesAffiliates

### Account Branding, Style & Content

You can change the appearance of some public-facing Smartmessages pages and some of our standard email templates using these boxes, branding them with your own styles, logos, fonts and colours rather than ours. [Read more about branding your account.](#)

View a branding test page

Your account has a parent that you can copy branding from, but it will overwrite anything you've already entered here.

Copy branding from Smartmessages

#### Your logo

Choose File

no file selected

Upload a logo image and we will use it to brand your subscribers' notification messages and PDF reports. Uploaded images should be PNG, JPEG or GIF format which will be converted to PNG (preserving transparency) and scaled to fit into 256x128 pixels. You should ensure your logo is readable on a light-coloured background.

#### Colours and fonts

Foreground colour ⓘ

# 606060

Background colour ⓘ

# f9f0dd

Heading font stack ⓘ Presets

'Helvetica Neue', Helvetica, Arial, sans-serif

Body font stack ⓘ Presets

'Helvetica Neue', Helvetica, Arial, sans-serif

These optional settings may be used for both pages and email templates, and take precedence over their respective style sheets.

Email cannot use dynamically downloaded fonts like web pages can, but you can make use of fonts that may be installed on the user's device. If you need help picking a font stack for your favourite font, there are many sites that can help you, such as [this one](#).



## 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.

The screenshot displays the 'Template properties' form. At the top, the status is 'Loaded' and the syntax check is 'OK'. Below these are tabs for 'Settings', 'HTML template', and 'Plain-text template'. The form includes input fields for 'Name' (containing 'RSS 1'), 'Description' (containing 'Single Story from Blog using RSS'), and 'Subject' (containing 'News from [unclear]'). There are checkboxes for 'Archived' (unchecked) and 'Shared' (checked). An 'Import template' section with a 'Choose File' button is partially visible. At the bottom are 'Save' and 'Preview' buttons. A tooltip titled 'Shared templates' is open over the 'Shared' checkbox, explaining that shared templates are available to all child accounts and can be used by selecting them from the template gallery.

**Template properties**

Status: **Loaded** Syntax check: **✓ OK**

**Settings** **HTML template** **Plain-text template**

**Name** ⓘ  
RSS 1

**Description** ⓘ  
Single Story from Blog using RSS

**Subject** ⓘ  
News from [unclear]

☐ **Archived** ⓘ  
☒ **Shared** ⓘ

**Import template**  
Choose File

**Shared templates**  
Shared templates are made available to all child accounts. Child accounts can use shared templates by selecting them from the template gallery when sending. If you want to share a template with just a single child account, use the 'Copy to child' button above.

**Save** **Preview**

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.

