

Creating a Customer Sub-Account



In Campaign Targeter, you can set up sub-accounts so you can manage promotional mail campaigns for individual stores or accounts. If you are a mail house or agency, you can use this feature to create individual sub-accounts for the customers you manage.

From the 'Customer' menu on the Dashboard:

1. Select the 'Sub-Accounts' option.

Note: Once you have created a subaccount, a separate menu will appear on the Dashboard.

You can use this menu to create promotional mail campaigns for each sub-account. You can also invite users to a sub-account.

	Customer	0	Sub-Accounts	6
-0				
Frien	dly Food Mart	-	Please Select	•
ß	Campaigns	0		
Ľ	Bookings	θ		
0	Catchment Sets	θ		
Þ	Sub-Accounts	1		
8	Users	0		



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From the 'Sub-Accounts' screen:

- 2. Select 'Create New' to create a new sub-account.
- **3.** Complete the fields of the 'Details' section.
- 4. Select 'Save'.

Manage Sub-Accounts	For Friendly Food Mart			
Sub-Accounts Create N	lew 2		e Help	
Filter	Q Details	Sub-Account name		
BARCOO SHIRE	2 Edit	Sub-Account name	Only the 'Sub-Account	
BRIGHTON SURF CLUB	Edit	Active	name' is mandatory.	
FRANKSTON CITY		Phone	Note: You can use the 'External reference' field to add a unique identifier if	
LATROBE CITY	Edit	Phone		
MARION CITY C		External reference	you have one.	
NICK' Existing active su	b-accounts	External reference		
will be listed here	and can be	Address		
icon.	g the 'Edit'	Address		
		ABN		
		ABN		
		ACN		
		ACN		
		Save 4		



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