

Subclients

An organization can often contain several units. For instance:

- the individual hotels which comprise a chain
- different departments within a school
- separate brands within an agency or company

It's often desired and recommended to keep the subscriber lists and marketing outreach separate for each unit. This is best accomplished through subclients. Subclients are logical subunits of a larger organization known as the "parent client."

There is a one-to-many relationship between a parent client and its subclients. That is, each subclient must have a parent client and a parent client can have many subclients.

Each subclient is a separate and distinct operating unit within iPost. The mailings, reports, subscriber lists and contracted mailing volume for a subclient are available only to that subclient and those with access to it. It is possible to share data between subclients using SQL queries, but this feature must be enabled.

It is possible for user accounts on the parent client to access all of the subclients but user accounts on the subclients cannot access the parent account or any other subclients.

Subclients Manager

You can access the Subclient manager by clicking *Subclient* in the General Settings menu. Here you will see a list of all subclients and can view their Client Settings by clicking on the hyperlinked subclient Name. You can also switch to a subclient account by clicking the *View In* option.

Field	Description
Name	The name of the subclient account. You can access the Client Settings for the account by clicking on the hyperlinked <i>Name</i> .
Status	The status of the subclient account is a billing status. There are four possible statuses: <ul style="list-style-type: none">• Active - The subclient is active and able to perform all applicable functions in iPost.• Defunct - The subclient is no longer performing operations in iPost and/or is no longer a unit of the parent organization. Subclient records cannot be deleted.• New - The subclient record is new. It must be edited, its information verified and the billing status set to "Active" before the subclient can arm and launch any mailing tickets.

Field	Description
	<ul style="list-style-type: none"> On Hold - The subclient is on administrative hold. This billing status is used in cases of outstanding invoices, etc.
Data Table Access	<p>This field indicates if data tables are enabled for the subclient. There are two possible statuses:</p> <ul style="list-style-type: none"> Ready – this status indicates that data tables are enabled. No Access – this status indicates that data tables are not enabled.
Action	Clicking the hyperlinked account name will take you to that subclient account.

Adding a Subclient

To add a subclient, click the *Add Subclient* button. Clicking the *Add Subclient* button will present the New Subclient form. The form contains the following fields:

Field	Description
Client Name	The name of the unit or organization. This name appears on default -provided subscription forms.
Client Token	The Client Token is a unique identifier which is used by many of iPost's automated systems. It is also required by the Generic Form Handler and iPost API. This value will be automatically generated from the Client Name entered above but may be altered prior to saving the record. The Client Token cannot exceed fourteen characters in length. This value cannot be changed once the subclient record is saved.
Primary Contact Email Address	The address where iPost should send emails regarding mailing setup.
Expiration Fallback URI	The URL used as the destination for your subscribers if they click on a link in your message after the mailing data has expired.
Data Table Access	Check this option if data tables should be enabled for the subclient.

Click *Save* to start the process of creating the new subclient record. This can sometimes take a number of seconds to complete. Please do not click another button or navigate away from the New Subclient form until this process is complete.

The Confirm New Subclient pop-up window will appear. Click *Submit* to Add the new subclient. Please do not click another button or navigate away from the Confirm New Subclient form until this process is complete.

! Adding additional subclients could incur extra costs. Please refer to your Services Agreement or contact iPost Client Services for more details.

Accessing Subclients

Users can access subclient through the Subclient Manager by clicking on the hyperlinked subclient account name or through the *Switch Client* menu. Using either of these methods will switch your iPost session to use the selected subclient.

Giving Users Access to Subclients

A user may access a subclient from one of two levels:

Parent client

User accounts can be created on the parent client and authorized to view and maintain subclients. These users will be able to view and maintain all of the subclients of the parent client. All functions for which the user is authorized on the parent client can also be performed by these users on all of the subclients.

To create one of these accounts:

1. Log into iPost with a user account which is authorized to Maintain Users. This account must be on the parent client.
2. If you are not there already, select the parent client from the *Switch Client* menu in the upper-right of iPost.
3. Navigate to *Users* under *General Settings*. This opens the iPost User Manager.
4. Create a new user account by clicking the *Add User* button.
5. Once the user has been created, select *Permissions* in the *Actions* drop down menu for the desired user account. Enable the *View Subclients* and optionally the *Maintain Subclients* capabilities found under the Agency Group category.

Subclient only

User accounts created on the subclient will have access only to the mailings, subscriber lists and reports for that subclient. These accounts will have access to no other client in iPost. The single exception is if a subclient itself has subclients.

To create one of these accounts:

1. Log into iPost with a user account which is authorized to Maintain Users. This account can be on either the parent client or the subclient.
2. Select the subclient from the *Switch Client* menu in the upper-right of the iPost.
3. Navigate to Users under *General Settings*.
4. Create a new user account by clicking the *Add User* button.