Email Marketing for Agencies and large Corporations

Efficient Customer Management via a central Account

CleverReach GmbH & Co. KG
Mühlenstr. 43
26180 Rastede
Germany

Email Marketing for Agencies and large Corporations

The CleverReach multi-account solution is designed to be used with ease by agencies and large corporations. It features a wealth of business functionalities to meet the needs for customer management in email marketing – from the administration of separate accounts to flexible pricing models. The multi-account solution is available as free of charge and with costs each with a different scope of features. More about this under **Costs and Comparisons.**

Table of Contents

- Requirements
- Explanation Backend
  - Customer Adminstration
  - Monitoring
  - Templates
  - Invoicing
  - Premium Settings
- General Settings for Customers
- Flexible Invoicing
- Payment of Commissions
- User Administration
- Creation of a Subdomain (only in Premium Version)
- Costs and Comparisons

Requirements

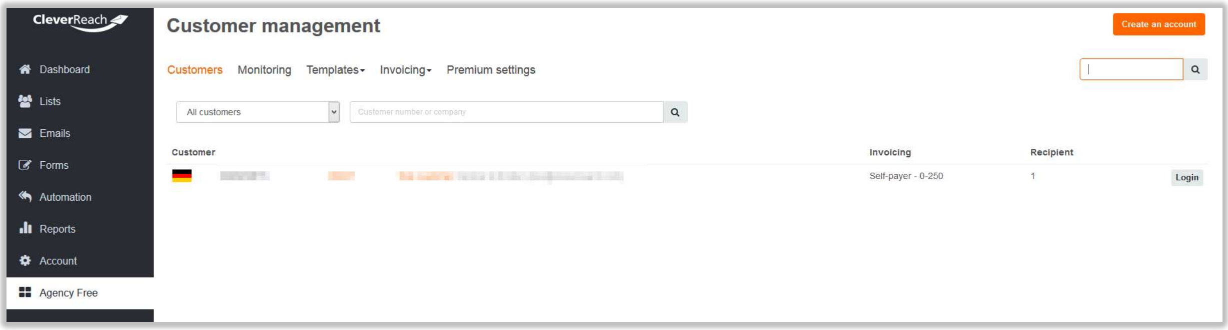
The only requirement for the use of the multi-account solution is a CleverReach account. Here you can get a CleverReach account: www.cleverreach.com/#signup

Our support can convert your basic CleverReach account into a multi-account. Please take into consideration that the multi-account solution is only available for agencies and large companies and therefore a verification needs to take place.

Explanation Backend

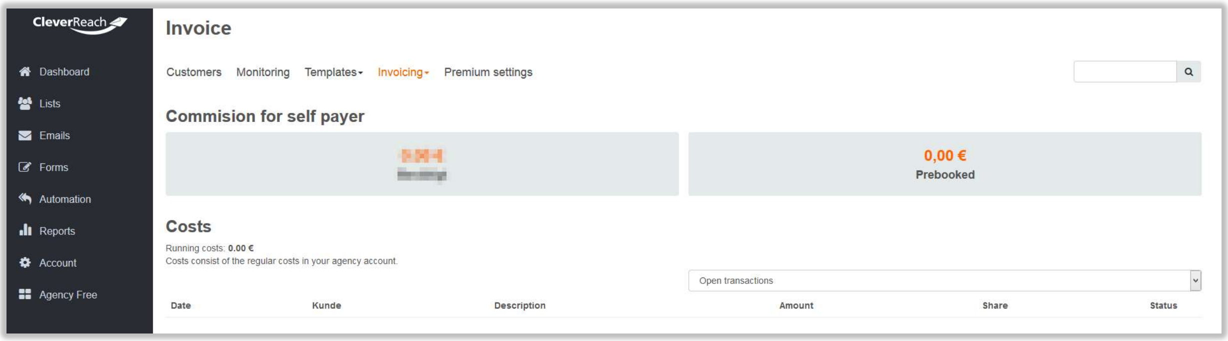
Customer Management

In this area you can create and manage as many sub accounts as you need for customers, branches or departments. You can find an account with the filter option as well as the search function.



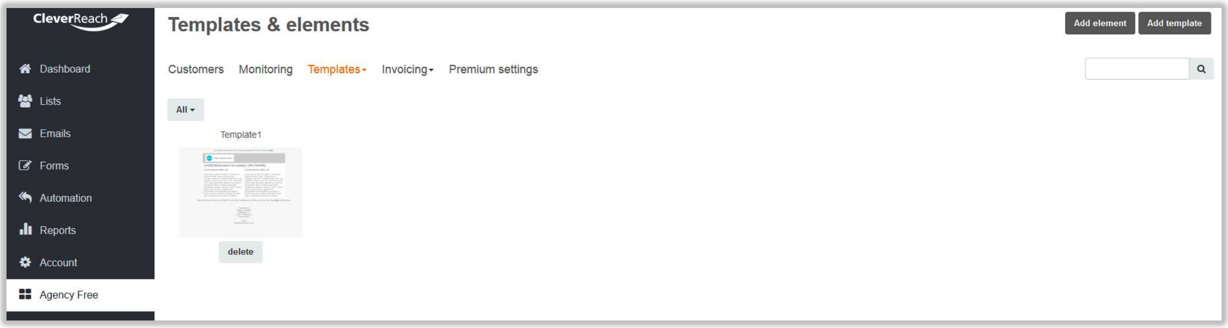
Monitoring

The Monitoring tab gives a quick overview and shows all email deliveries and activities from your sub accounts or rather customers.



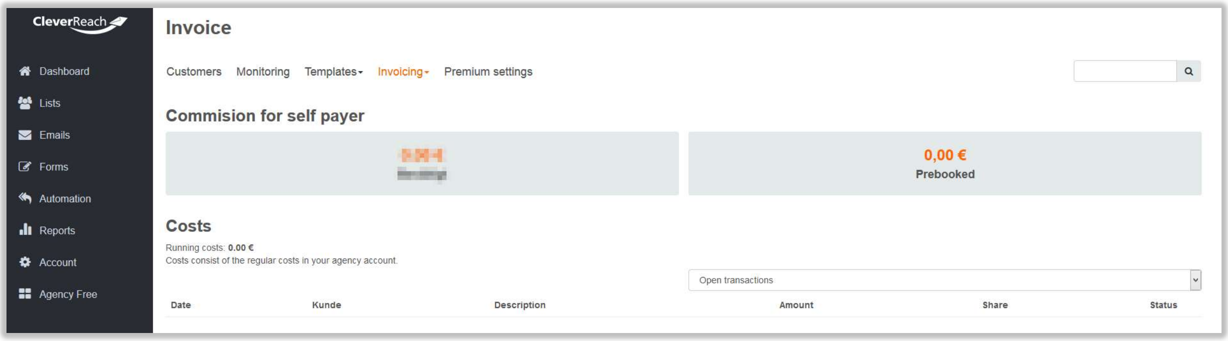
Templates

In tab **[Templates]** insert your own email templates and elements for the sub accounts. You can save there templates and elements with the CI of your company for branches, customers or departments. Standard templates and elements from CleverReach are also available there and can be hidden or unhidden for certain sub accounts (see also topic Settings).



Invoicing

In tab **[Invoicing]** you can find an overview about the commissions from all paying users. Here you can also insert your bank details. Furthermore you get an overview about the estimated costs from your clients, for whom you take over the payments.
More about commissions can be found [here].

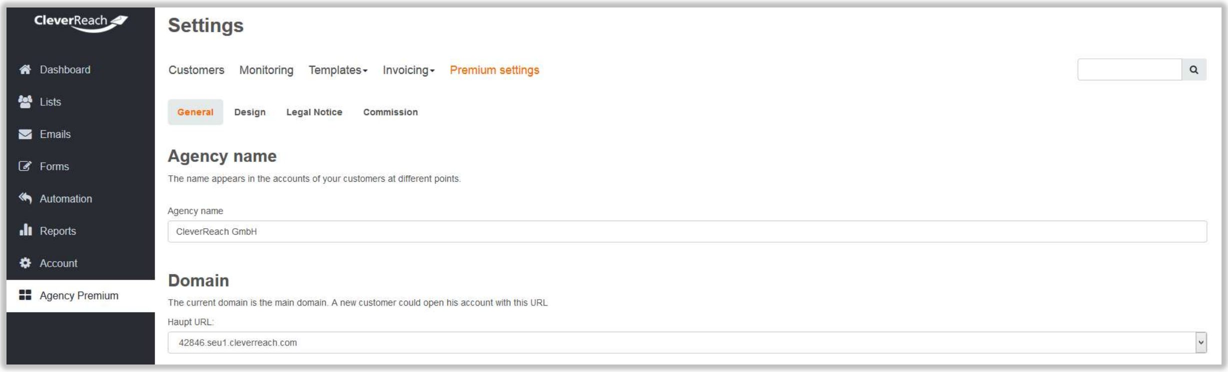


Premium Settings

Some features in the multi-account solution are only available in the premium version. You can get all functions by purchasing an upgrade ([here you get an overview about all features]).

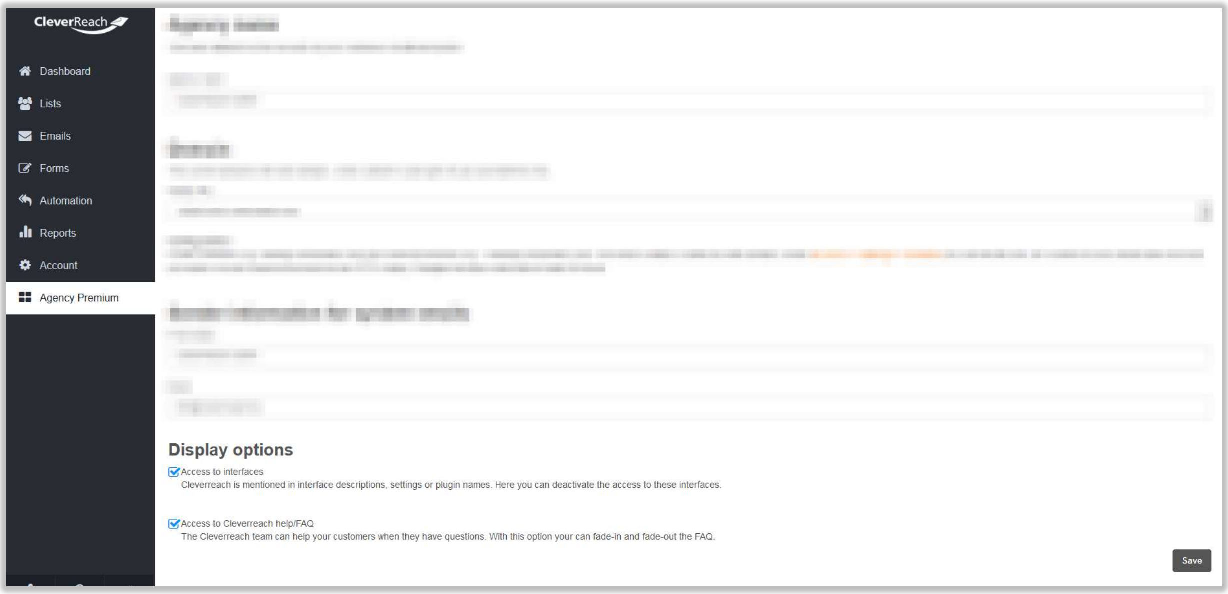
General > Agency or Company name (Premium)

You can insert an individual name, e.g. the company name, the name of the department or your agency name. This name will be shown in different parts of the program, e.g. in the browser tab.



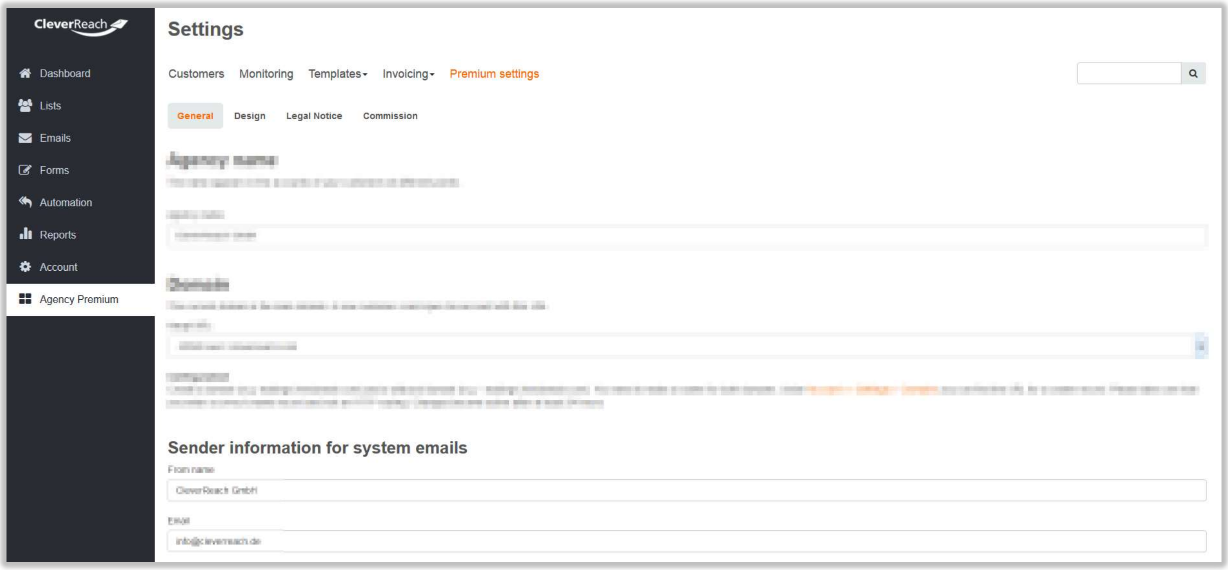
General > Domain (Premium)

Insert in this in area your own domain name (URL). Your customers can open their accounts with this URL and this will be the standard URL for tracking links.
More about settings concerning an own domain and cname records can be found [here](#).



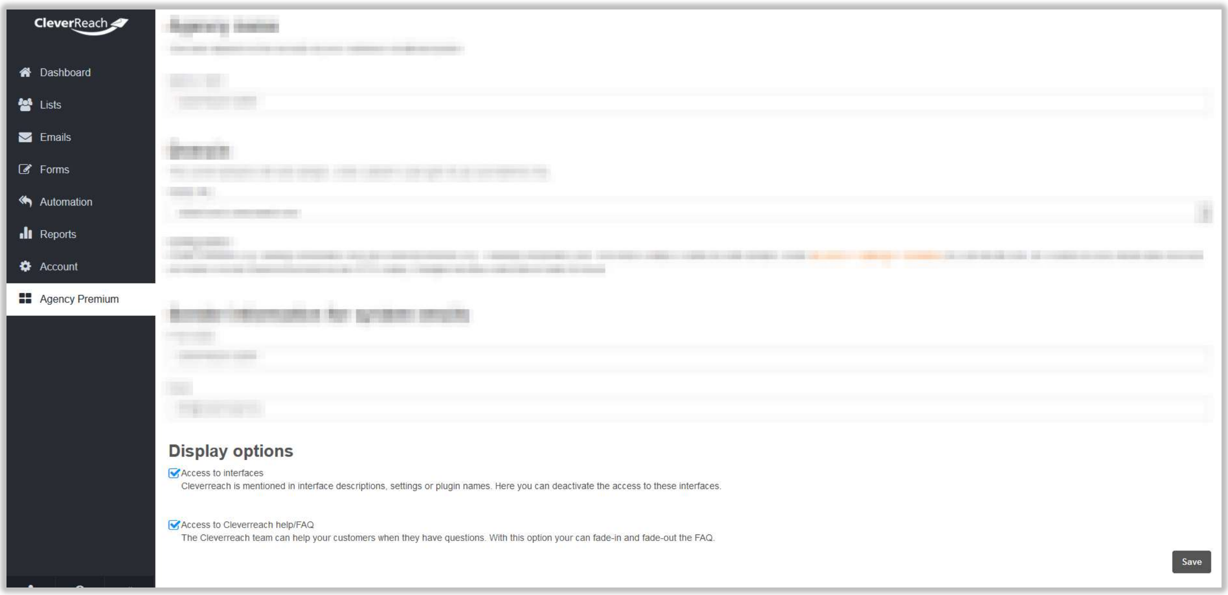
General > Sender information for system emails (Premium)

Insert here the sender information for emails that are automatically sent by the system (e.g. invoices, password and so on).



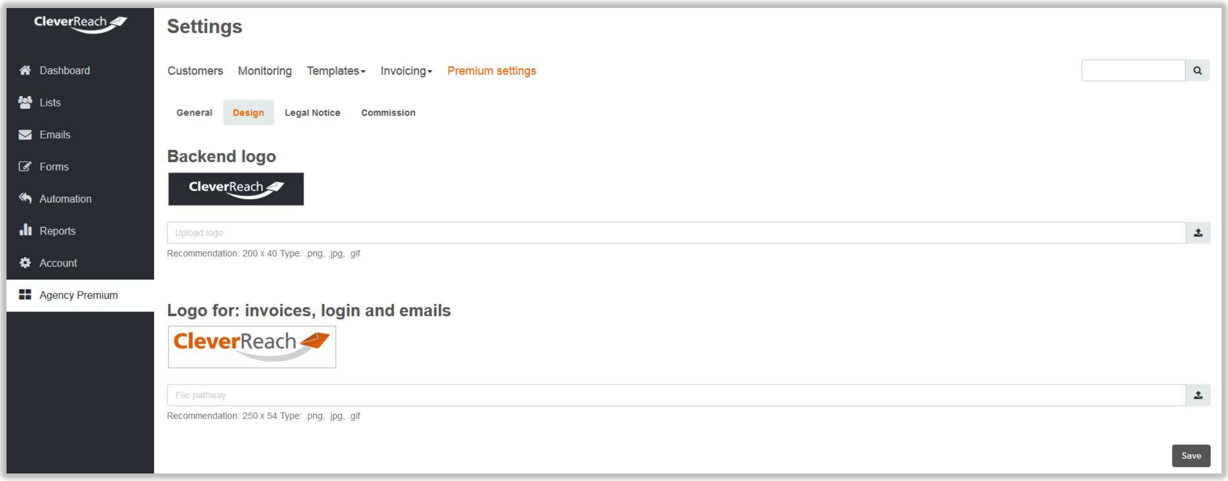
General > Display options (Premium)

Here, you'll set if your customers will have access to all interfaces and our help center including FAQ. You should restrict the access if you want to sell the software under your own name as the name **„CleverReach"** is mentioned in several interfaces and the helpcenter.



Design (Premium)

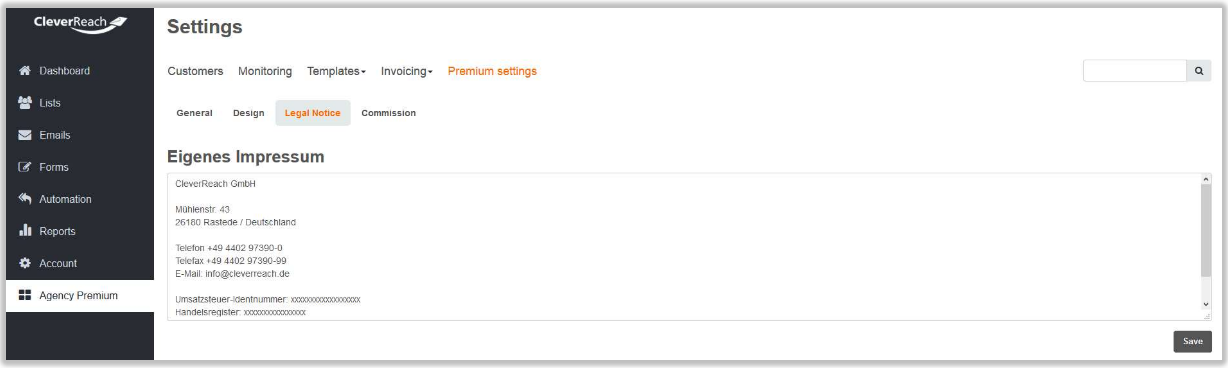
The system can be labelled with your own branding. Insert your own logo for the user interface, system messages, login page and invoices.



Legal Notice (Premium)

You might wish to take over the invoices for some customers. In these cases that legal notice will be shown in the sub acount that was added under „"Premium Settings" / „Legal Notice". That users that pay the invoices by their own will see CleverReach and your data in the legal notice as the invoicing is carried out by CleverReach.

This is just about the legal notice shown in the sub account of your customer/department/branch. Each customer or account must take its own legal notice in the newletters.

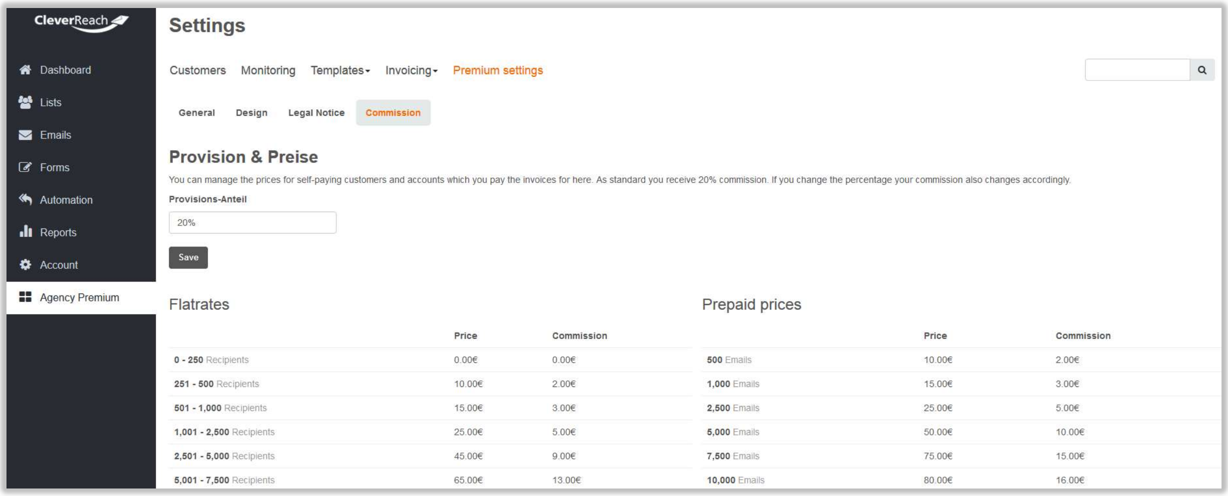


Commission (Premium)

You get a commission for customers that pay their invoices by their own. You can set how much you will get. The standard commission is 20%. The commission will change when you adjust the percentage. Should you select a commission of below 20% your client would get a discount. Please remember that these changes will modify the amount invoiced. A commission of 10% means that your customers get a discount of 10%. Your customers need to pay more when choose a commission of more than 20%.

This feature is only available in the premium version.

The premium multi-account solution is with costs and can be booked under Agency Free.



Commissions are paid midmonth provided that the commission is above 15€ (plus VAT)

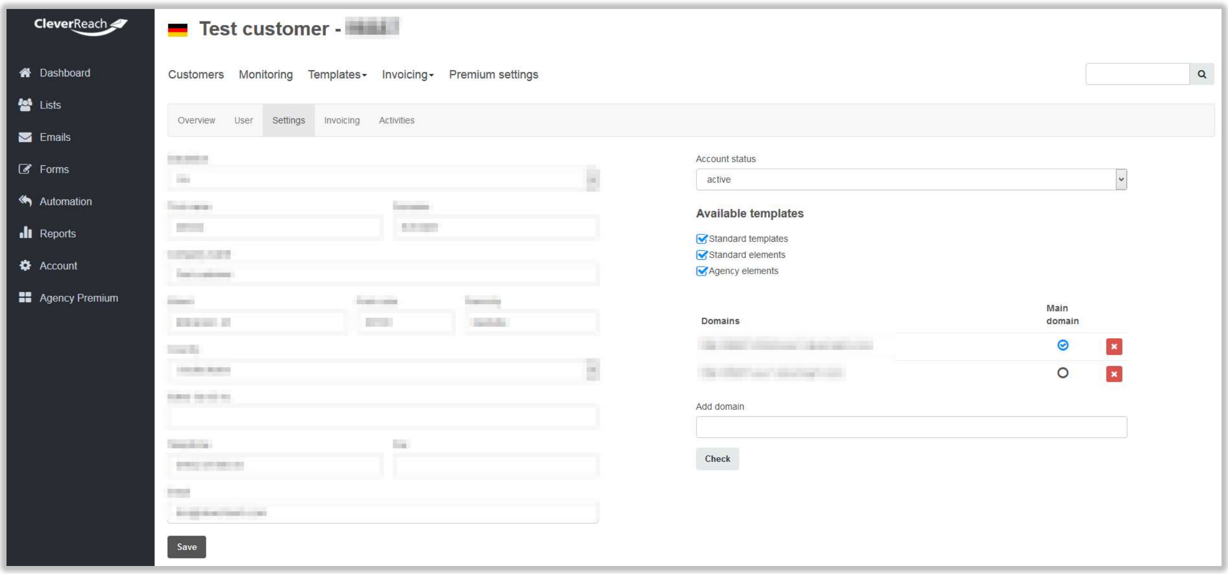
General Settings for Customers

Customer data, domain settings and account status can be handled for each customer. Just open **[Agency Free] – [Customers]** and click on the respective client.

Adjust the account status under tab **[Settings]**:

- active – account can be used without restrictions.
- no delivery possible – customer cannot send emails.
- no login possible – customer cannot login
- completely blocked – account is blocked completely and the links in emails are deactivated.

Furthermore under **[Available templates]** you can set, if the customer may have access to the Cleverreach standard templates and elements.
Would you like to delete the account please contact our support.



Flexible Invoicing

The payment method can be set for each customer individually. The following options are available:

1. **Customer pays (Invoicing by CleverReach)**
   All transactions take place between the customer and CleverReach. We will create and send the invoices as well as handle the payments.

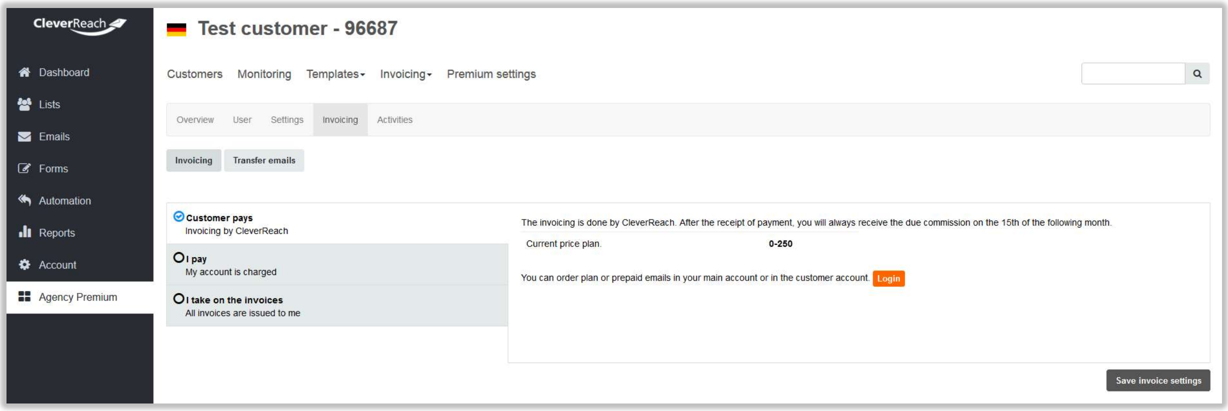
   After the payment you will get the commission which is transferred on the 15th. You or your customer can book the plan in the sub account.

2. **I pay (My account is charged)**
   a. **Unlimited delivery**
      The customer can send an unlimited number of emails. All actions performed by the customer will be invoiced to you retrospectively on the 15th of the following month. When your account does not have sufficient prepaid mails (or high volume emails) these emails will be charged with prepaid prices.
   b. **Limited delivery**
      The customer receives an automatic monthly quota, which is deducted from your monthly quota. (**flatrate plans are excluded**).

3. **I take on the invoices (All invoices are issued to me)**
   Invoicing takes place between you and CleverReach. Insert your bank account details into your multi-account before your client books a plan. Only your payment data will be used.
   You will not get a monthly commission from us. Invoices will show the standard prices minus the commission (generally 20%).
   More about this under **Commission**

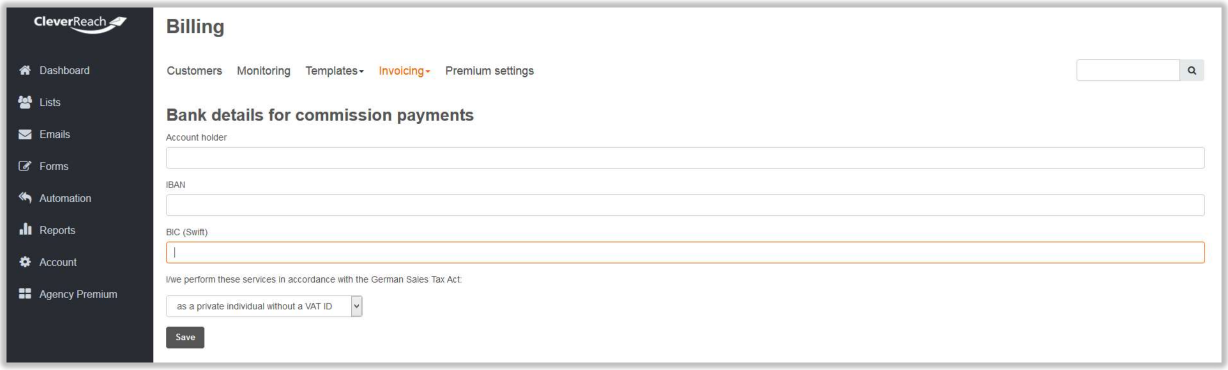
   Important: When you select this option, all transactions by your customer will be charged to you. In order to limit the transactions create a user for your customer with limited rights

Select the respective payment method for your customer by a click on the account under **[Agency Free] – [Customers].** Open tab **[Invoicing]**



Payment of Commissions

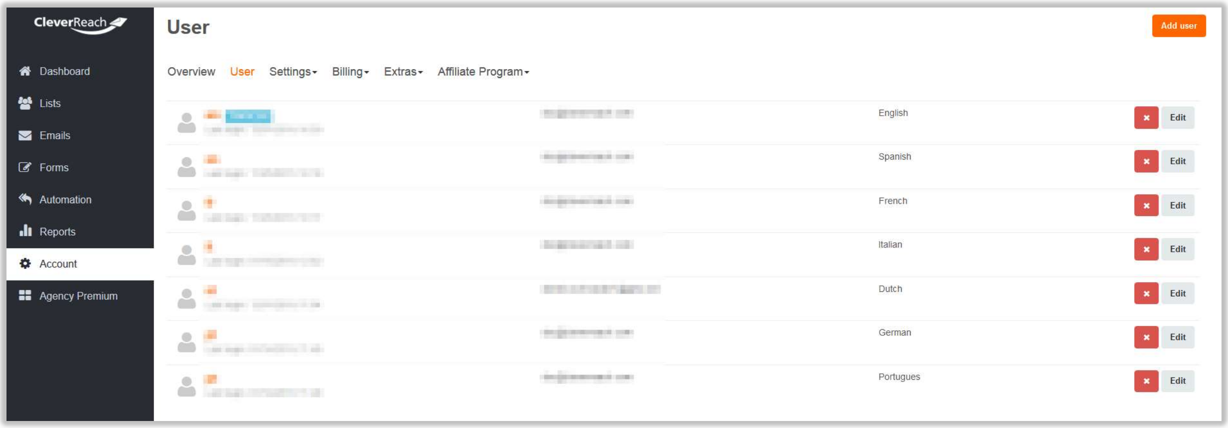
We need your bank account details for the payment of the commissions. Insert them under **[Agency Free] – [Invoicing] – [Payout information].**



User Administration

Create as many users as you need for employees of your agency, company, branch or your customer that should have access to the account. User right management and access rights can be set there. The user adminstration can be found in the account under **[Account] – [User]**.

Important: You can give each user its own system language.

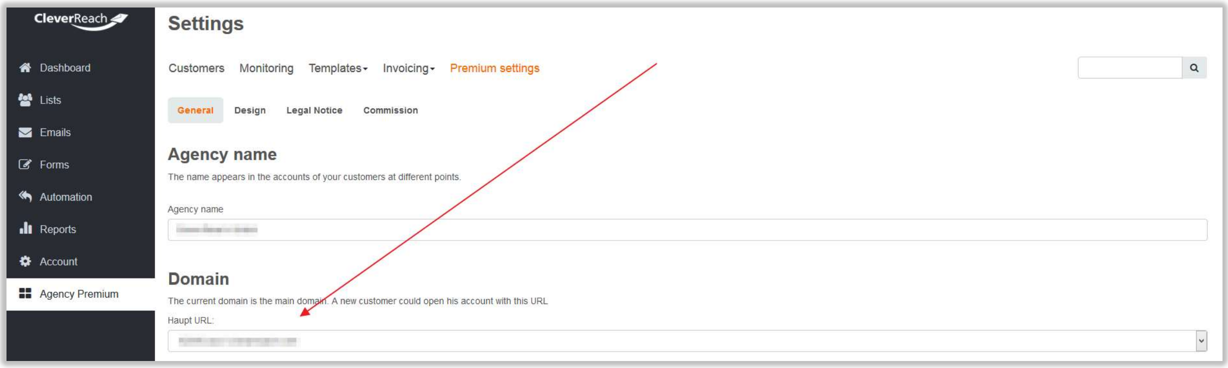


Creation of a Subdomain (only in Premium Version)

By using your own tracking URL recipients will not immediately notice that the email they just received from you was sent by a third party. To use your own domains within our agency solution you will need to set up two domains so that CleverReach information can now be seen in the URLs. Carry out the following steps:

1. Create a subdomain (e.g. newsletter.yourdomain.com) and set a cname record.
   You will find the necessary information on the CNAME directly in your account under **[Account] – [Einstellungen] – [Domains]**.
2. Create an additional wildcard domain for your future customers: *.newsletter.yourdomain.com and enter the same **CNAME** information as for your main domain.

After 48 hours at the latest you should be able to select your domain as master domain under **[Agency Premium] – [Premium Settings]**



Please note the following instructions:

1. We do **not support the use of A-Records**, since domains no longer function if we switch our IP-addresses.
2. Updating domain settings can take up to 48 hours depending on the provider. For this reason we recommend to wait at least 48 hours before using a new domain.
3. The subdomain may not begin with numbers or special characters.
4. Some providers demand that the CNAME end with a period.

A detailed description can be found in our **helpcenter**.

Costs and Comparisons

Features	Agency Free	Agency Premium
Customer adminstration	✓	✓
Monitoring	✓	✓
Agency support	✓	✓
Use of own domain		✓
Own branding (logo, name, legal notice)		✓
CleverReach interfaces and support / faq can be hidden		✓
Costs	free	99,00 €* / month

* All prices displayed exclude VAT.