

Managing Sub Accounts

Managing Sub Accounts as the Group/Team Administrator

After you subscribe as a team/group administrator, you'll be able to see a link option on your Account page > Subscriptions tab. This link option is called Sub Accounts and will look like this:

[Home](#) [Subscriptions](#) [Payments](#) [Logout](#)

MEMBERSHIP	SUBSCRIPTION	ACTIVE	CREATED	EXPIRES	CARD EXP.
Personal Development (50) GT <i>mp-sub-5ea6b5d805b62</i>	Enabled £74 / year Next Billing: 29th April 2021	Yes	27th April 2020	29th April 2021	Update Sub Accounts

Clicking on that link will reveal the account information for that subscription. For example.

Corporate account

4 of 50 Sub Accounts Used

[Add Sub Account](#)

Search Sub Accounts...

Page 1 of 1 (4 Sub Accounts)

USERNAME	EMAIL	FIRST NAME	LAST NAME	
eduardo	eduardo.barton@example.org	Eduardo	Barton	Remove
annie.gottlieb	annie.gottlieb@example.net	Annie	Gottlieb	Remove
sylvia.sawayn	sylvia@example.org	Sylvia	Sawayn	Remove
zena_schroeder	zena.schroeder@example.net	Zena	Schroeder	Remove

Adding users manually with the Sub Account button

You can add an account by using the Add Sub Account button.

Existing Username

You can put the username of an existing user to add that user this subscription.

OR create a new user

Username (Required)

Used to enter the username that will be associated with the Sub Account . Please note that usernames cannot be changed once submitted, so it's important that this is entered correctly.

Email (Required)

Enter the email to be associated with the Sub Account. The new member's welcome email will be sent to this email if that option is enabled below.

First Name (Optional)

First name of the user as needed.

Last Name (Optional)

Last name of the user as needed.

Send NEW members the welcome email (Optional)

Check the checkbox next to this option to send the Sub Account a welcome email.

The email is sent to the email entered above and looks like this.

Videos That Explain... What You Need To Know

Hi Mary

An administrator has given you access to new training videos.

Before you can access your account, you'll need to create a password, use this link to [create your password now](#).

You can access your account using the details below.

You can login here: <https://videosthatexplain.whatyouneedtoknow.co.uk/login/>

Membership: Personal Development (50) CA

Username: mary@gmail.com

Best wishes,

The Videos That Explain Team

Alternatively, you can send the user the link to the login page

<https://videosthatexplain.whatyouneedtoknow.co.uk/login>

and ask them to use the Forgot Password button to first create a password and then login.

Login

Username or E-mail

Password

Remember Me

[Log In](#)

[Forgot Password](#)

Inviting users using the Sign Up URL

This is a simple URL that the Groups and Teams administrator can copy and send to anyone they would like to subscribe under their membership.

Use the clipboard icon to easily copy it, and paste the link into an email. Just remember that anyone who has access to the link can register and sign up.

Example

From: andy@whatyouneedtoknow.co.uk
Sent: 19 April 2020 11:52
To: mary@gmail.com
Subject: Access to training videos

Hi

Please use this link to watch your training videos

<https://videosthatexplain.whatyouneedtoknow.co.uk/register/ca-dl-personal-development-50-2/?ca=e35ffd2aa89861a0287e966ef04e4a1>

Best wishes,

You can use this URL to try it out. You'll go through to a demonstration page.

<https://videosthatexplain.whatyouneedtoknow.co.uk/register/sign-up-url-demonstration/?ca=f4fa5f0d0c954d06658624882d87bb1b>

Importing Sub Accounts via CSV

You can use this section to import a previously created comma delimited CSV file with a maximum of 200 Sub Account entries.

Additionally you can enable or disable the following emails:

Send NEW members a password reset link (does not email existing members)

Sends the user a simple password reset link because the welcome email cannot include any password information.

Send NEW members the welcome email if they haven't received it already for the membership

This is the same welcome email mentioned above in the Add Sub Account (button) section.

Formatting the Sub Accounts CSV File

The only fields needed for the CSV are:

- * Username ("username")
- * Email ("email")
- * First name ("first_name")
- * Last name ("last_name")

Here's an example

username	email	first_name	last_name
annie.gottlieb	annie.gottlieb@example.net	Annie	Gottlieb
zena_schroeder	zena.schroeder@example.net	Zena	Schroeder
Eduardo	eduardo.barton@example.org	Eduardo	Barton
sylvia.sawayn	sylvia@example.org	Sylvia	Sawayn

Search Sub Accounts

Corporate account can use this search bar to search for Sub Accounts in the table below it instead of manually searching each page. For best results, search by username or email.

Sub Accounts table

Here, your corporate account user will be able to see all Sub Accounts associated with their Corporate Account. The table will show the Sub Account 's username,

email, first name, last name, and also give the option to manually remove any Sub Accounts with the Remove link next to each entry.

Export Sub Accounts

Clicking on this option just below the Sub Accounts table will export all Sub Accounts associated with the Corporate Account user.