



Sub-Account User Guide

Shopee Education Hub

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INTRODUCTION

Introduction to Sub-Account

Sub-account is a multi-shop and multi-role management system. It allows sellers to set up multiple accounts with different permissions for different shops to process daily operations.

This way, sellers can have a team to manage different shop functions, as well as have varied shop decorations, shipping instructions and more tailored for each shop.



Introduction to Sub-Account

Key benefits of having sub-accounts:

- Main account can have a team of staff member to manage different shop functions, such as operations, customer service, and more.
- Main account can bind multiple shops under the same merchant to manage together.
- As main account and sub-account holders can both gain access to Seller Centre and Webchat, it significantly increases business efficiency.



STEP-BY-STEP GUIDE

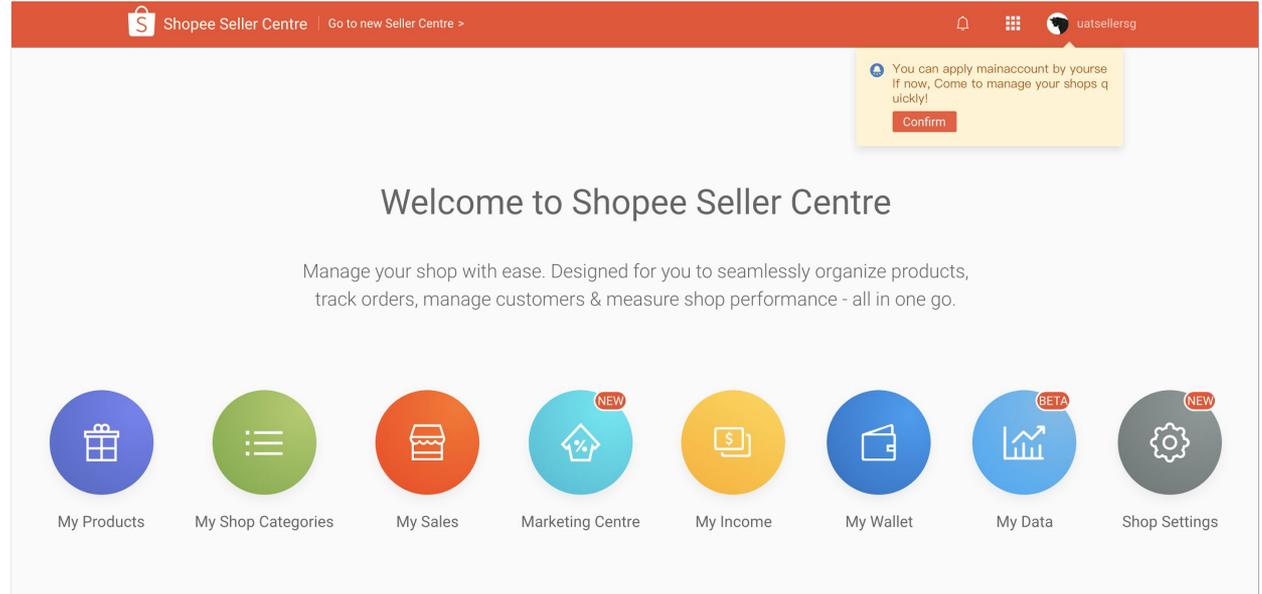
Main Account Creation

How to Create Your Main Account

Step 1:

Sellers who are invited to set up a sub-account will find a notification in the Seller Centre.

Currently, sub-account is open only to selected sellers.



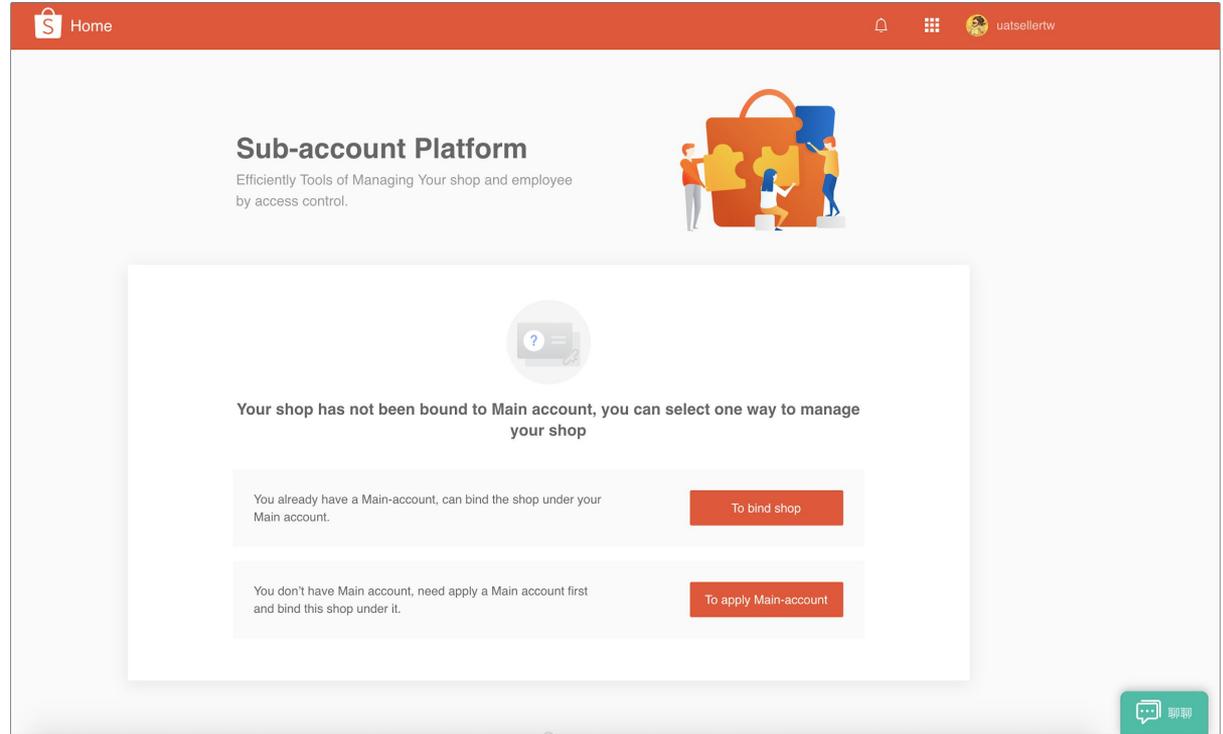
How to Create Your Main Account

Step 2:

Create a main account if you do not already have one.

OR

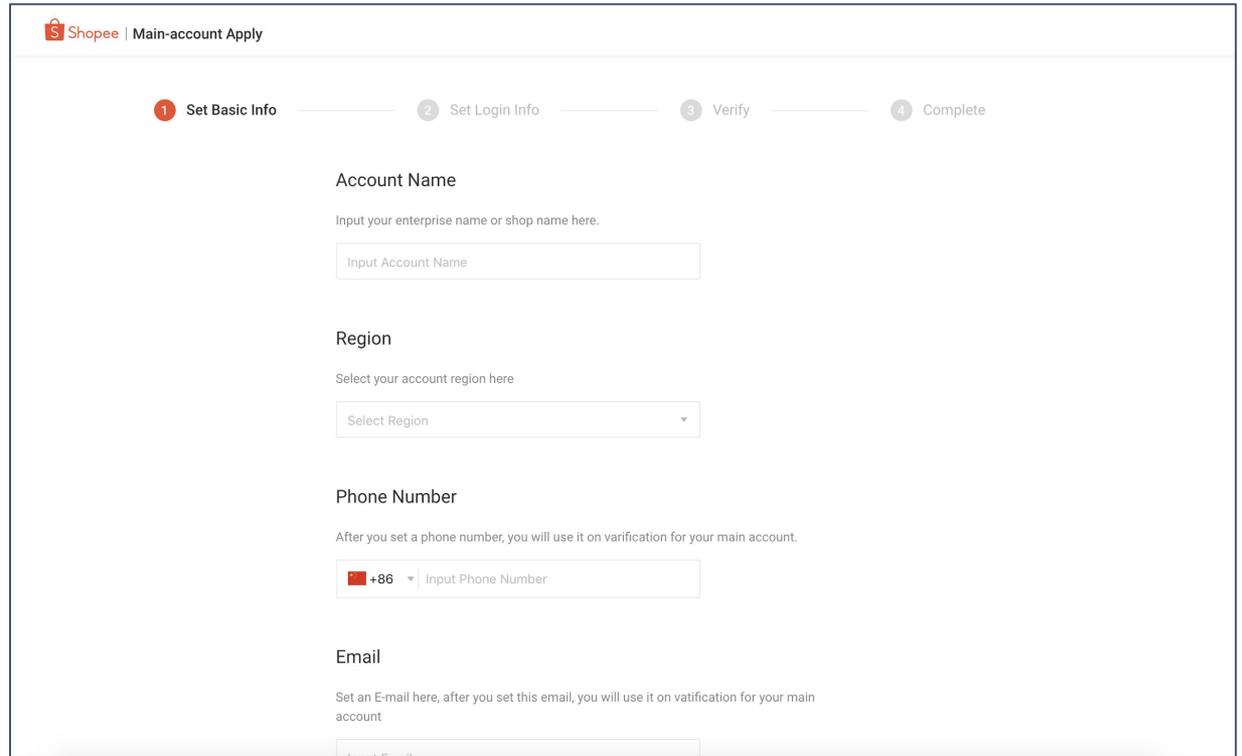
You can also start to bind shops to an existing main account.



How to Create Your Main Account

Step 3:

If you choose to create a main account, fill in all the information accordingly.



The screenshot shows the 'Main-account Apply' page on Shopee. At the top, there is a progress bar with four steps: 1. Set Basic Info (active), 2. Set Login Info, 3. Verify, and 4. Complete. The form contains the following sections:

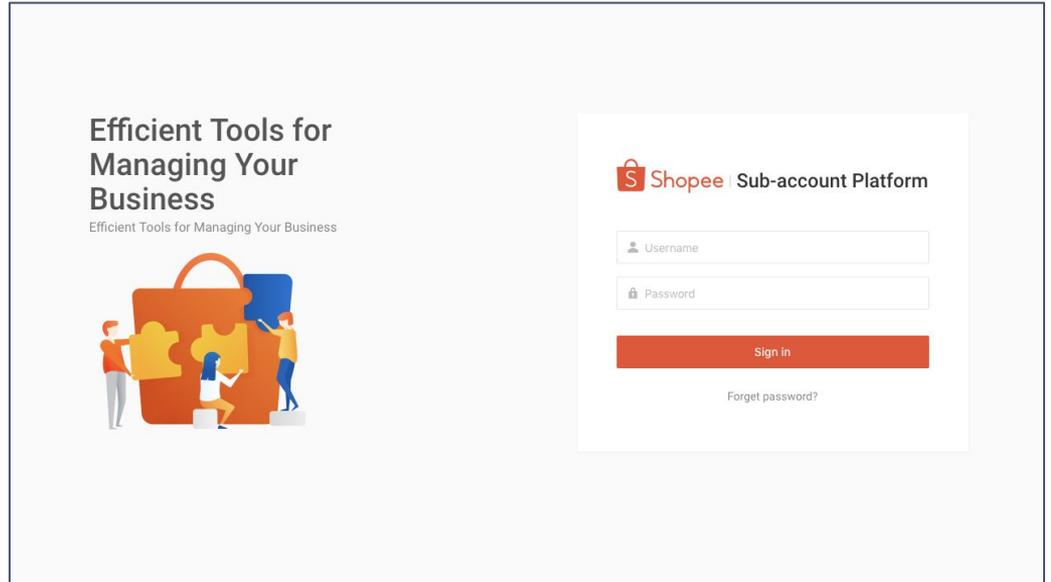
- Account Name:** A text input field with the placeholder 'Input Account Name'. Above it, the text reads 'Account Name' and 'Input your enterprise name or shop name here.'
- Region:** A dropdown menu with the placeholder 'Select Region'. Above it, the text reads 'Region' and 'Select your account region here.'
- Phone Number:** A text input field with a country code dropdown set to '+86' and the placeholder 'Input Phone Number'. Above it, the text reads 'Phone Number' and 'After you set a phone number, you will use it on varification for your main account.'
- Email:** A text input field with the placeholder 'Input Email?'. Above it, the text reads 'Email' and 'Set an E-mail here, after you set this email, you will use it on vatication for your main account'.



How to Create Your Main Account

Step 4: Using your newly-created account, log in to our sub-account platform:

<https://subaccount.shopee.com/>



How to Create Your Main Account

Step 5:

After logging in, you should see this homepage.

The screenshot shows the 'Members' page in the Shopee Sub-account Platform. The page title is 'Members 3/100' and it lists three members: Agent B, Agent C, and Emma. Each member has a role (Agent or Chat CS) and a status (Active). There is a search bar for member names and a 'Create a member' button.

Shopee | Sub-account Platform Dan ▾

Members 3/100 + Create a member

Sample Test Account

All Status ▾ All Roles ▾

Active and suspended members 3

A Agent B webchatauatvictorg	Agent	● Active ▾ Details
A Agent C webchatauatbentdantest	Agent	● Active ▾ Details
E Emma webchatauatemmac	Chat CS	● Active ▾ Details

Seller Center >



STEP-BY-STEP BIND SHOP

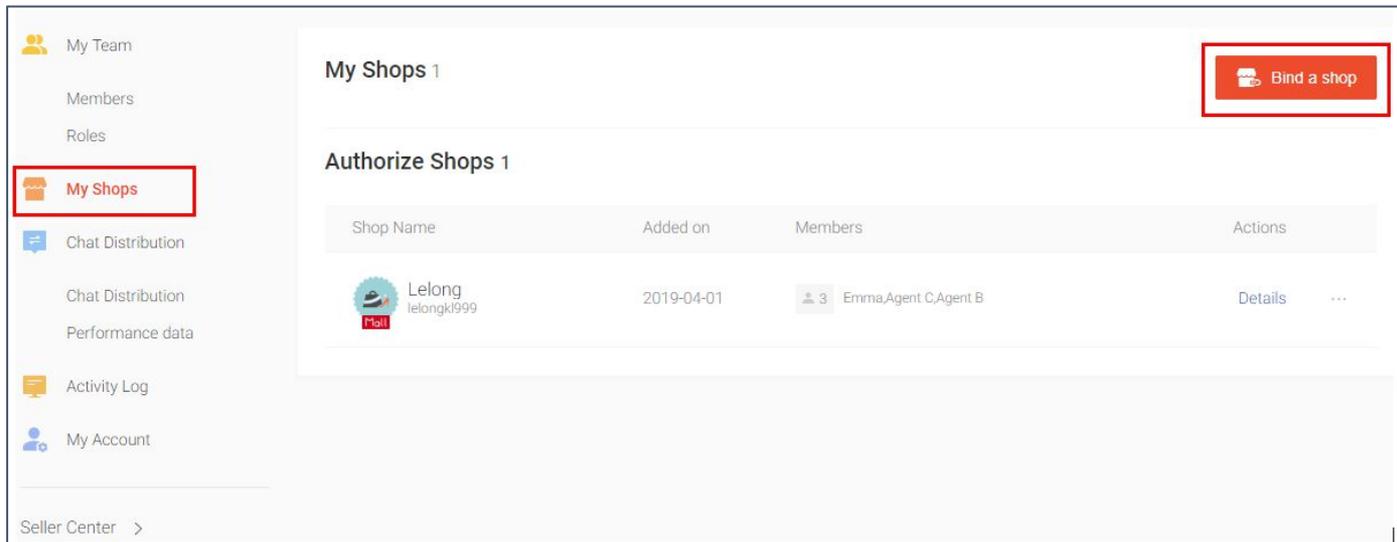
Add Shops

How to Bind Shop

Step 1:

After logging in, you can find My Shops.

Step 2: Click on Bind a shop.



The screenshot displays the Seller Center interface. On the left sidebar, the 'My Shops' menu item is highlighted with a red box. The main content area shows 'My Shops 1' with a 'Bind a shop' button highlighted in a red box. Below this is the 'Authorize Shops 1' table with one row for 'Lelong'.

Shop Name	Added on	Members	Actions
 Lelong lelongk1999	2019-04-01	3 Emma,Agent C,Agent B	Details ...

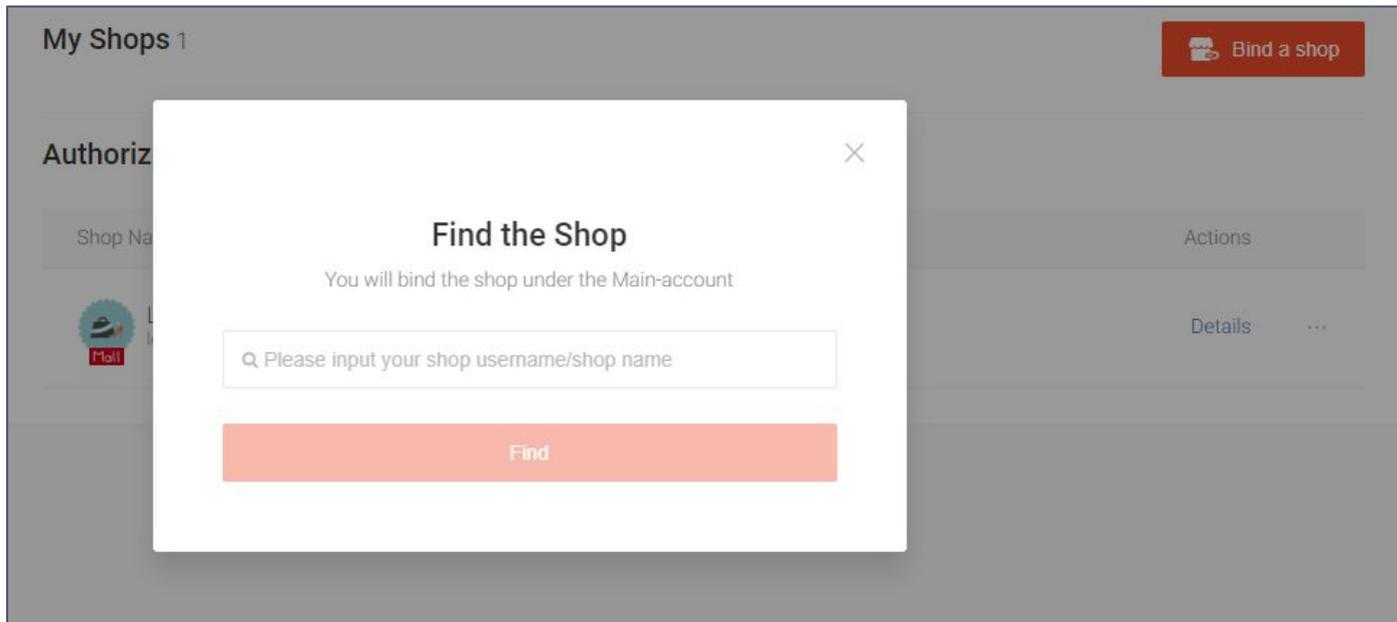


How to Bind Shop

Step 3:

Type the username/shop name.

Step 4: Click on Bind a shop.

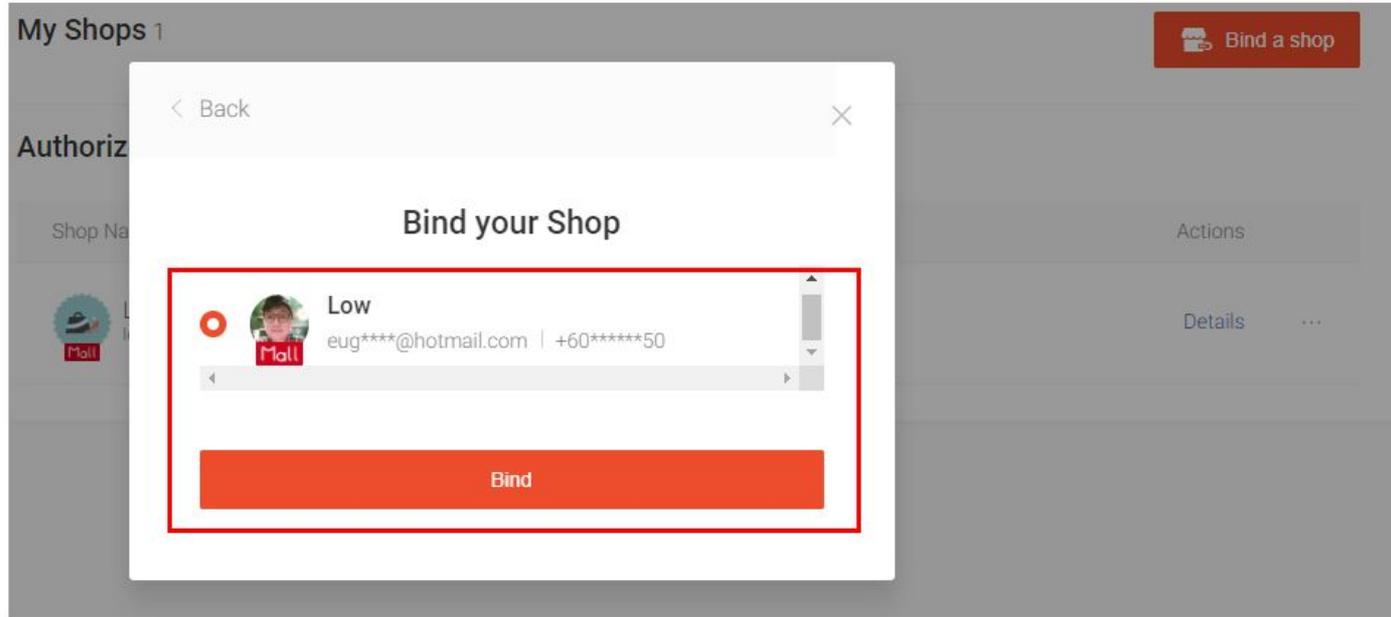


How to Bind Shop

Step 5:

Once it displayed the correct username/shop name.

Step 6: Click on Bind.



STEP-BY-STEP GUIDE

Sub-Account Creation & Permission Management

Sub-Account Creation & Permission Management

Step 1:

In the sub-account platform,

- Go to My Team
- Click on Members
- Click on Create a Member

The screenshot displays the 'Members' management page for a 'Sample Test Account'. The interface includes a sidebar with navigation options: My Team, Members (highlighted), Roles, My Shops, Chat Distribution, Performance data, Activity Log, and My Account. The main content area shows 'Members 3/100' and a 'Create a member' button. Below this, there are filters for 'All Status' and 'All Roles', and a search bar for 'Member's name/username'. A list of three members is shown, each with a profile picture, name, username, role, and status. The first two are 'Agent B' and 'Agent C', both with 'Agent' roles and 'Active' status. The third is 'Emma' with a 'Chat CS' role and 'Active' status. Each member entry has a 'Details' link.

Name	Username	Role	Status	Details
Agent B	webchatuat:victorg	Agent	Active	Details
Agent C	webchatuat:bentdantest	Agent	Active	Details
Emma	webchatuat:emmac	Chat CS	Active	Details



Sub-Account Creation & Permission Management

Step 2:

Fill in the details of the sub-account holder.

The screenshot shows a three-step process for sub-account creation. Step 1, 'Basic Information', is the current step and is highlighted with a red circle. Step 2, 'Permissions', and Step 3, 'Complete', are shown in grey. The form contains three input fields: 'Member's Name' with a placeholder 'Input member's name', 'Email Address' with a placeholder 'Member's Email Address' and a sub-label 'To receive account activation email', and 'Phone Number' with a dropdown menu showing '+60' and a placeholder 'Input Phone Number' and a sub-label 'To receive verification code during account activation process and other sensitive scenarios'. At the bottom, there are two buttons: 'Cancel' and 'Next : Permissions'.



Sub-Account Creation & Permission Management

Step 3:

Select a role for this sub-account.

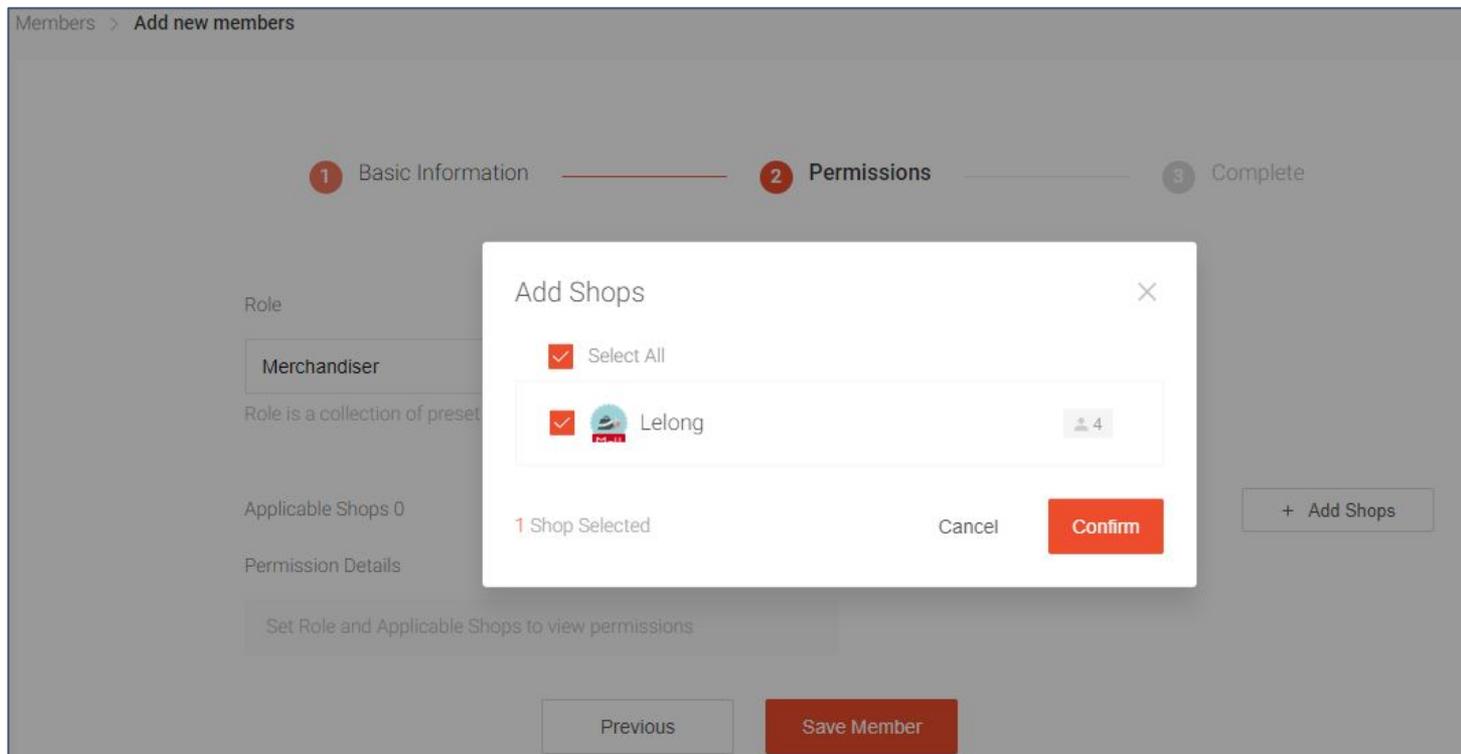
The screenshot displays a three-step process for sub-account creation. Step 1, 'Basic Information', is completed. Step 2, 'Permissions', is the current active step, indicated by a red circle and a red line. Step 3, 'Complete', is shown as a greyed-out option. The 'Role' section features a dropdown menu labeled 'Select Role' with a list of roles: Administrator, Merchandiser, Fulfillment, Finance, Chat CS, and Brand Login. A red box highlights this dropdown menu. Below the dropdown, there is a text input field with a placeholder 'Set permissions resembling various duties'. To the right of the dropdown is a '+ Add Shops' button. At the bottom of the form, there are two buttons: 'Previous' and 'Save Member'.



Sub-Account Creation & Permission Management

Step 4:

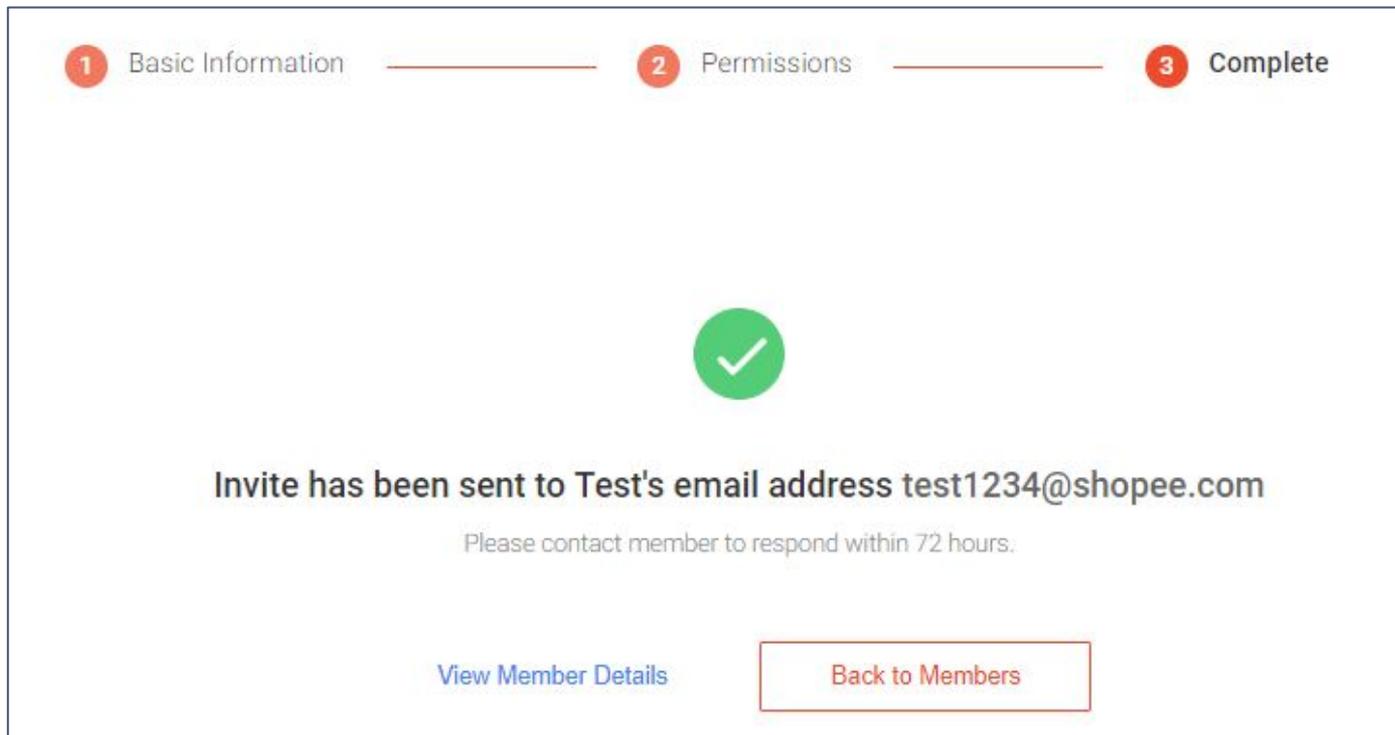
Select the shop this sub-account has permission to access.



Sub-Account Creation & Permission Management

Step 5:

An email will be sent to the sub-account holder. Open the email to activate the account.



The screenshot shows a three-step progress bar at the top: 1 Basic Information, 2 Permissions, and 3 Complete. A large green checkmark is centered on the screen. Below it, the text reads: "Invite has been sent to Test's email address test1234@shopee.com". Underneath that, it says "Please contact member to respond within 72 hours." At the bottom, there are two buttons: "View Member Details" (a blue link) and "Back to Members" (a button with a red border).



Sub-Account Creation & Permission Management

Step 6:

You can still edit roles and permissions after activation, by clicking on Details next to each member's name.

The screenshot shows a 'Members' management page for 'Sample Test Account'. At the top, it displays 'Members 3/100' and a 'Create a member' button. Below this are filters for 'All Status' and 'All Roles', and a search bar for 'Member's name/username'. The main content area lists three members: Agent B (webchatuat:victorg), Agent C (webchatuat:bentdantest), and Emma (webchatuat:emmac). Each member entry includes a role button (Agent or Chat CS), a status indicator (Active), and a 'Details' link.

Member Name	Username	Role	Status	Action
Agent B	webchatuat:victorg	Agent	Active	Details
Agent C	webchatuat:bentdantest	Agent	Active	Details
Emma	webchatuat:emmac	Chat CS	Active	Details



Sub-Account Creation & Permission Management

Step 7: Modify any personal information, role and shop access.

 **Agent B**
Joined on 01-04-2019

Active Delete Member

Basic Information

Name: Agent B [✎](#)

Email: victor.gan@gmail.com [✎](#)

Phone: +60193122243 [✎](#)

Account and Security

Username: webchatuat:victorg

Password: [Reset Password](#)

Permissions

[Edit Permission >](#)

Role: Agent

Applicable Shops: 1 Shops

 Lelong



STEP-BY-STEP GUIDE

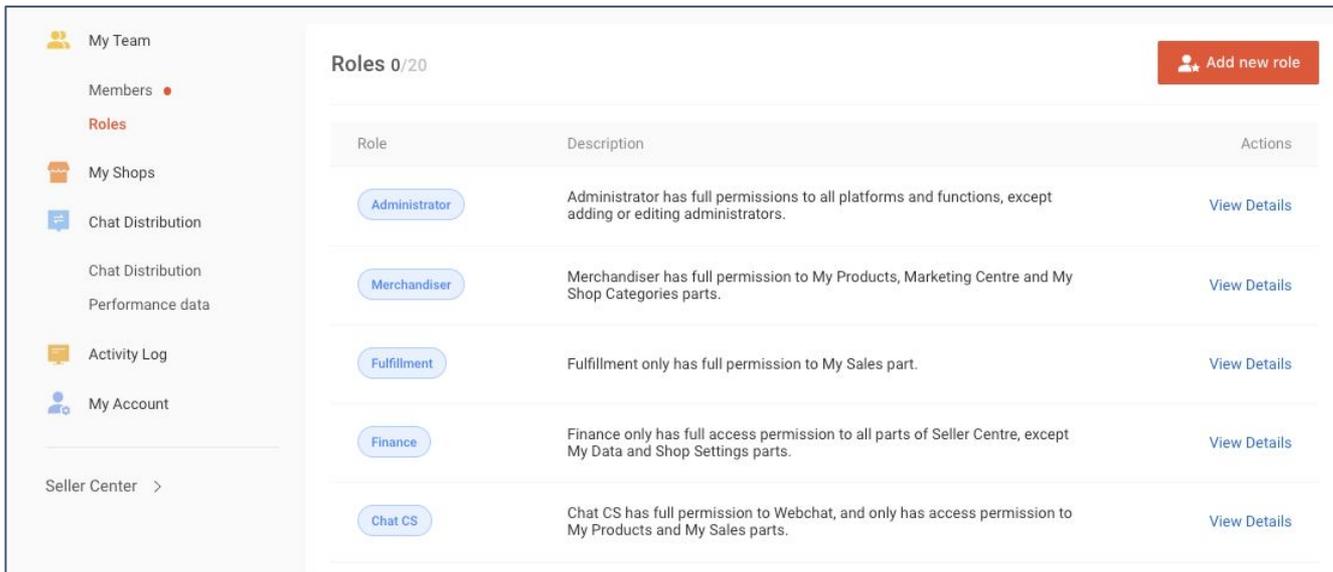
Role Creation

Role Creation

Step 1:

In the sub-account platform,

- Go to My Team
- Click on Roles
- Click on Add New Role



Roles 0/20 Add new role

Role	Description	Actions
Administrator	Administrator has full permissions to all platforms and functions, except adding or editing administrators.	View Details
Merchandiser	Merchandiser has full permission to My Products, Marketing Centre and My Shop Categories parts.	View Details
Fulfillment	Fulfillment only has full permission to My Sales part.	View Details
Finance	Finance only has full access permission to all parts of Seller Centre, except My Data and Shop Settings parts.	View Details
Chat CS	Chat CS has full permission to Webchat, and only has access permission to My Products and My Sales parts.	View Details

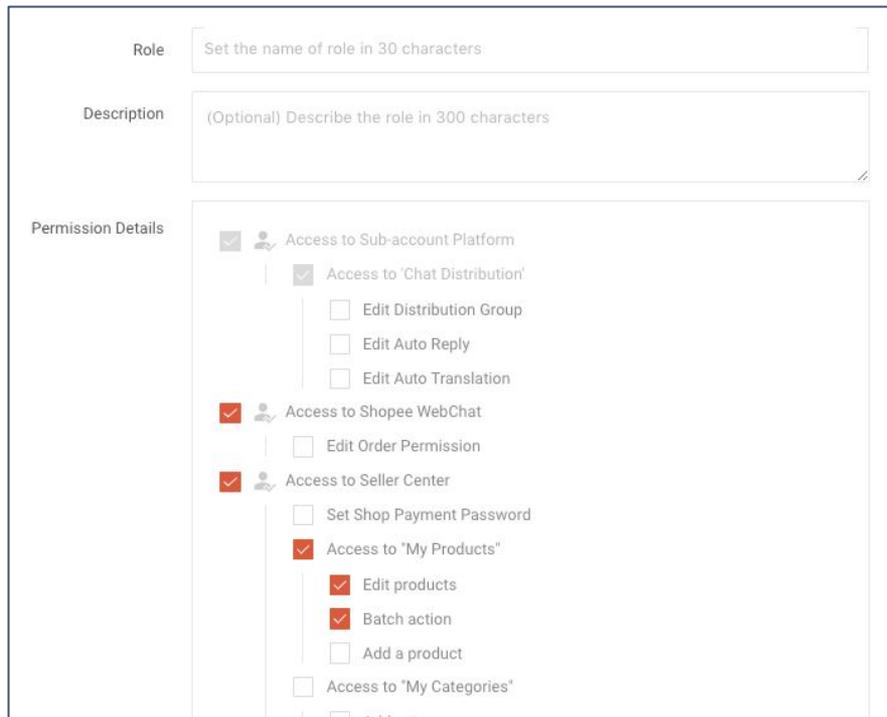


Role Creation

Step 2:

Set the role name, description and default permission.

You can create a new member or change the role of an existing member.



The screenshot displays a form for creating a role. It includes the following sections:

- Role:** A text input field with the placeholder text "Set the name of role in 30 characters".
- Description:** A text area with the placeholder text "(Optional) Describe the role in 300 characters".
- Permission Details:** A list of permissions with checkboxes and expandable sub-lists:
 - Access to Sub-account Platform
 - Access to 'Chat Distribution'
 - Edit Distribution Group
 - Edit Auto Reply
 - Edit Auto Translation
 - Access to Shopee WebChat
 - Edit Order Permission
 - Access to Seller Center
 - Set Shop Payment Password
 - Access to 'My Products'
 - Edit products
 - Batch action
 - Add a product
 - Access to 'My Categories'



STEP-BY-STEP GUIDE

Webchat Set Up

Webchat Set Up

Webchat is an instant messaging portal that lets sellers interact with shoppers and answer their queries, thereby driving conversion, better reviews and customer loyalty.

[Click here](#) to learn more about setting up Webchat.





Thank you

Learn more about best practices for selling on
Shopee on Seller Education Hub:

<https://seller.shopee.com.my/help/start>