



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

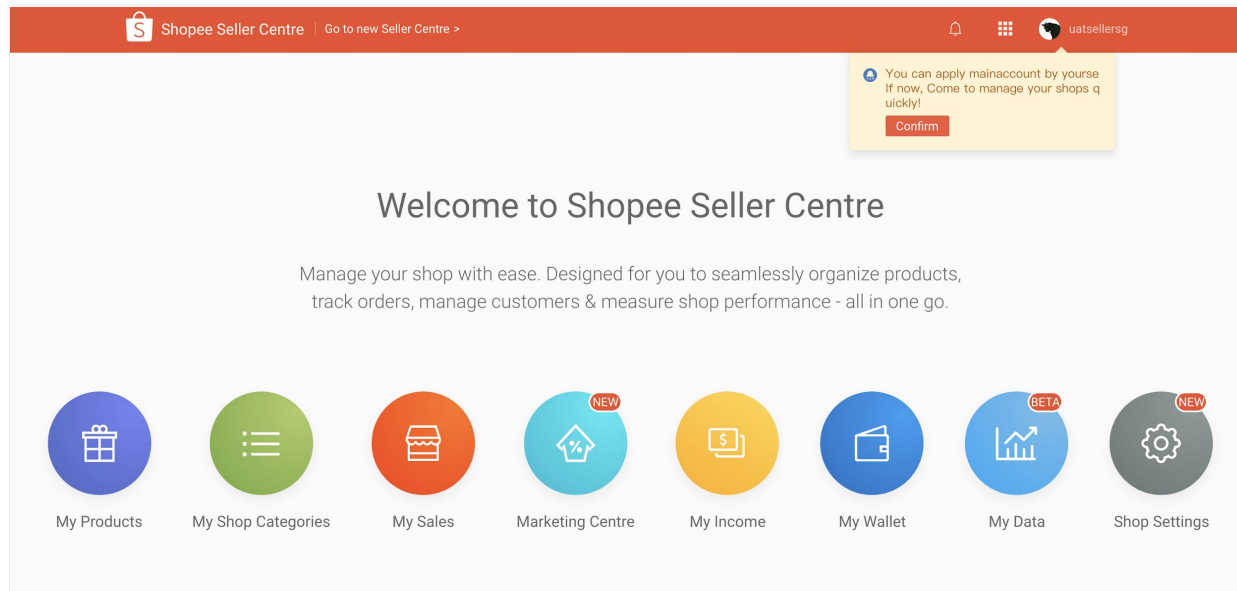
Main Account Creation

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.



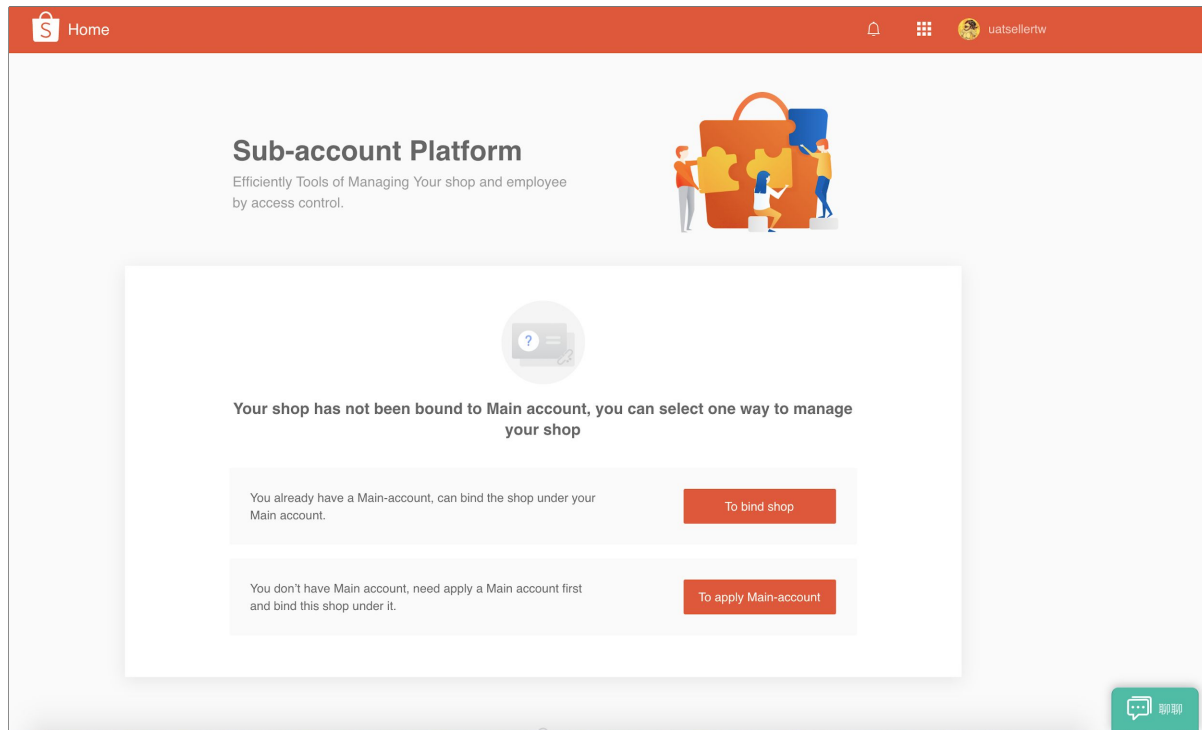
How to Create Your Main Account

Step 2:

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

OR

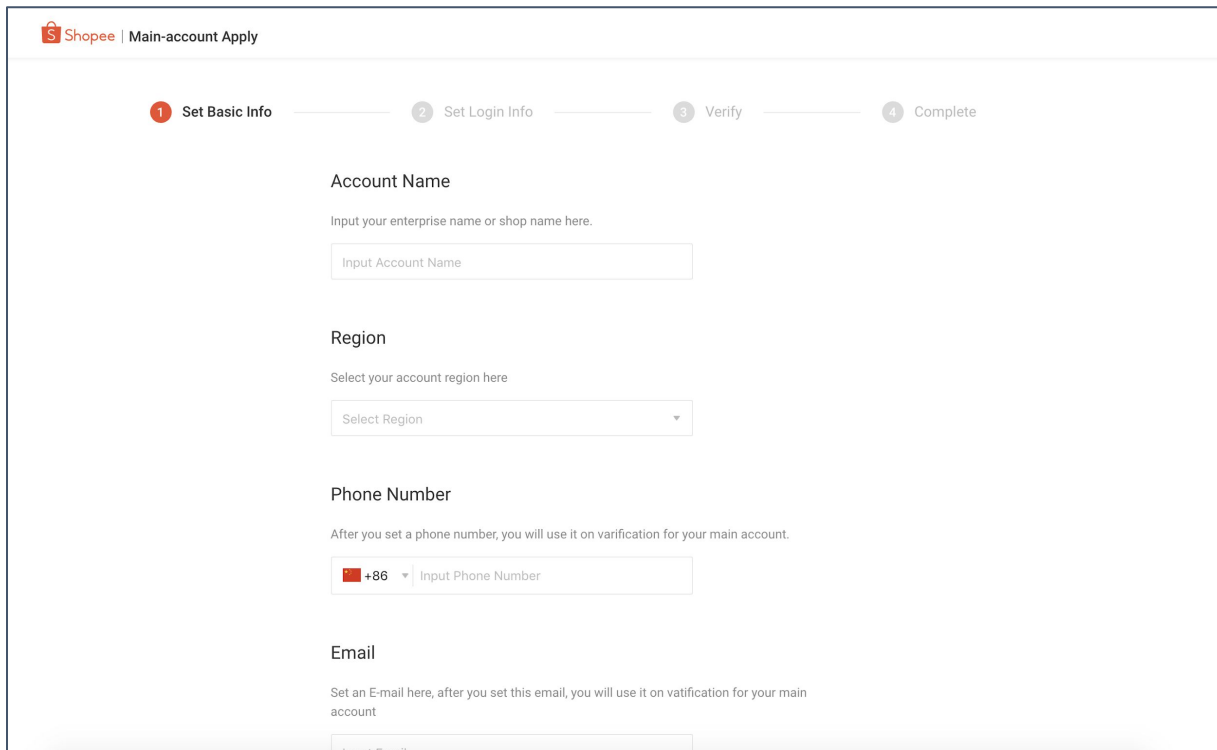
You can also start to bind shops to an existing main account.



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's a progress bar with four steps: 1. Set Basic Info (active), 2. Set Login Info, 3. Verify, and 4. Complete. The form fields are as follows:

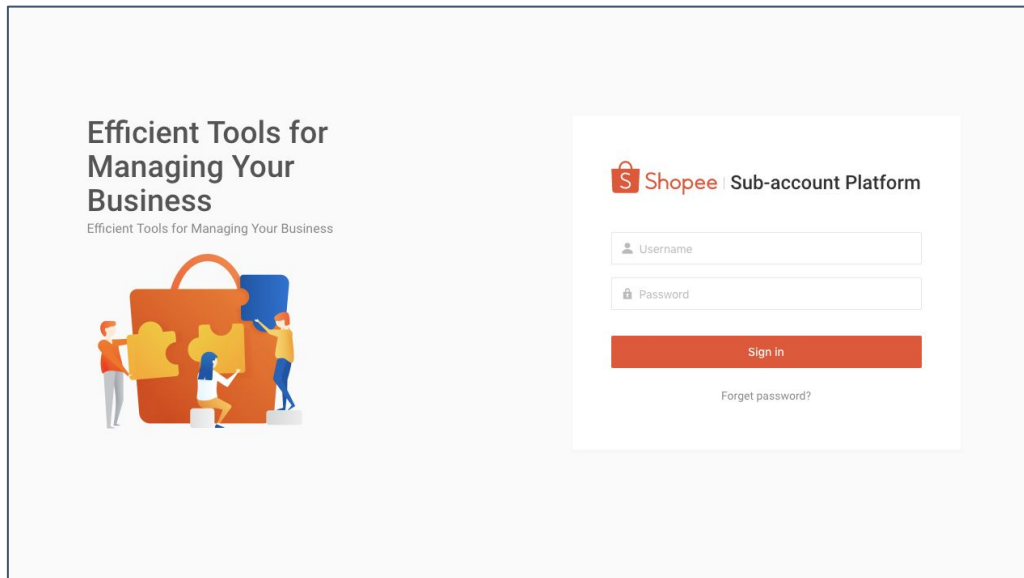
- Account Name:** A text input field with the placeholder 'Input Account Name'. Above it, the text says 'Input your enterprise name or shop name here.'
- Region:** A dropdown menu with the placeholder 'Select Region'. Above it, the text says 'Select your account region here.'
- Phone Number:** A text input field with a country code dropdown set to '+86' and the placeholder 'Input Phone Number'. Above it, the text says 'After you set a phone number, you will use it on verification for your main account.'
- Email:** A text input field with the placeholder 'Input Email'. Above it, the text says '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 displays the Shopee Sub-account Platform interface. On the left is a sidebar menu with options: My Team, Members (highlighted), Roles, My Shops, Chat Distribution, Chat Distribution, Performance data, Activity Log, and My Account. At the bottom of the sidebar is a link to the Seller Center. The main content area is titled 'Members 3/100' and includes a 'Sample Test Account' link. There are filters for 'All Status' and 'All Roles', and a search bar for 'Member's name/username'. A red 'Create a member' button is in the top right. Below the filters, it states 'Active and suspended members 3'. A table lists three members: Agent B (webchatuatvictorg, Agent role, Active status), Agent C (webchatuatbentdantest, Agent role, Active status), and Emma (webchatuatemmac, Chat CS role, Active status). Each member entry has a 'Details' link.

Member Name	Username	Role	Status	Action
Agent B	webchatuatvictorg	Agent	Active	Details
Agent C	webchatuatbentdantest	Agent	Active	Details
Emma	webchatuatemmac	Chat CS	Active	Details



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 a table titled 'Authorize Shops 1' with one row for 'Lelong'.

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

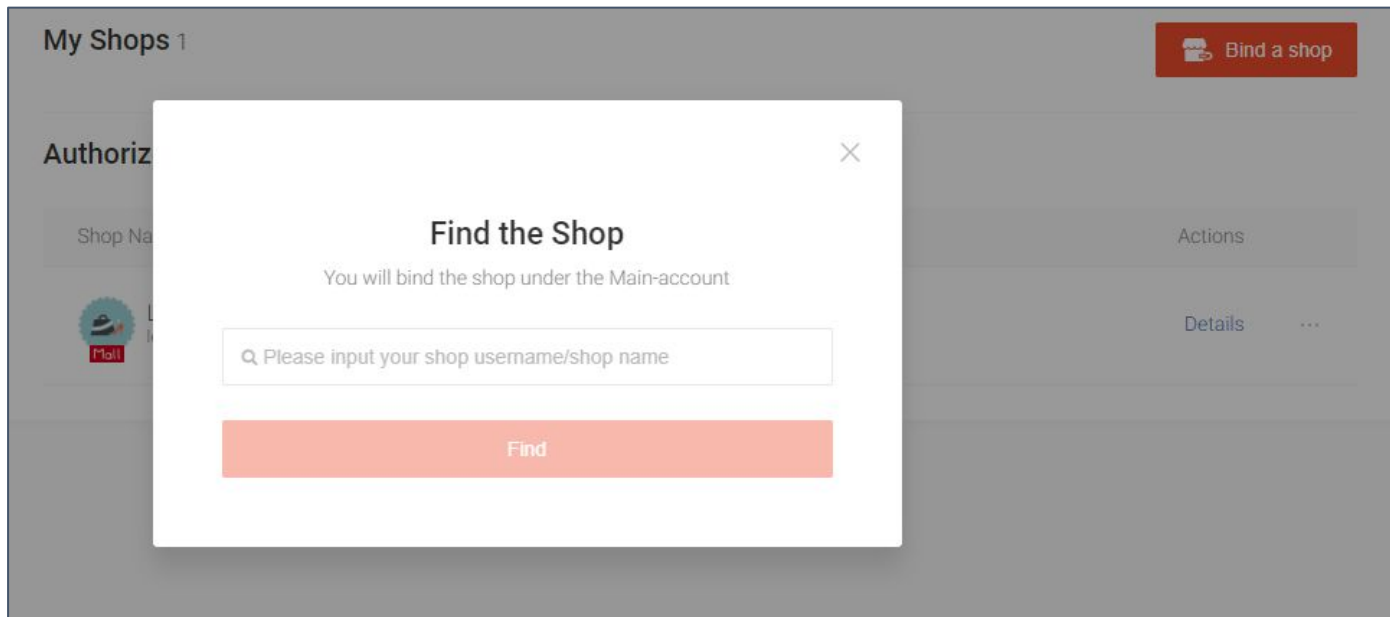


How to Bind Shop

Step 3:

Type the username/shop name.

Step 4: Click on Bind a shop.

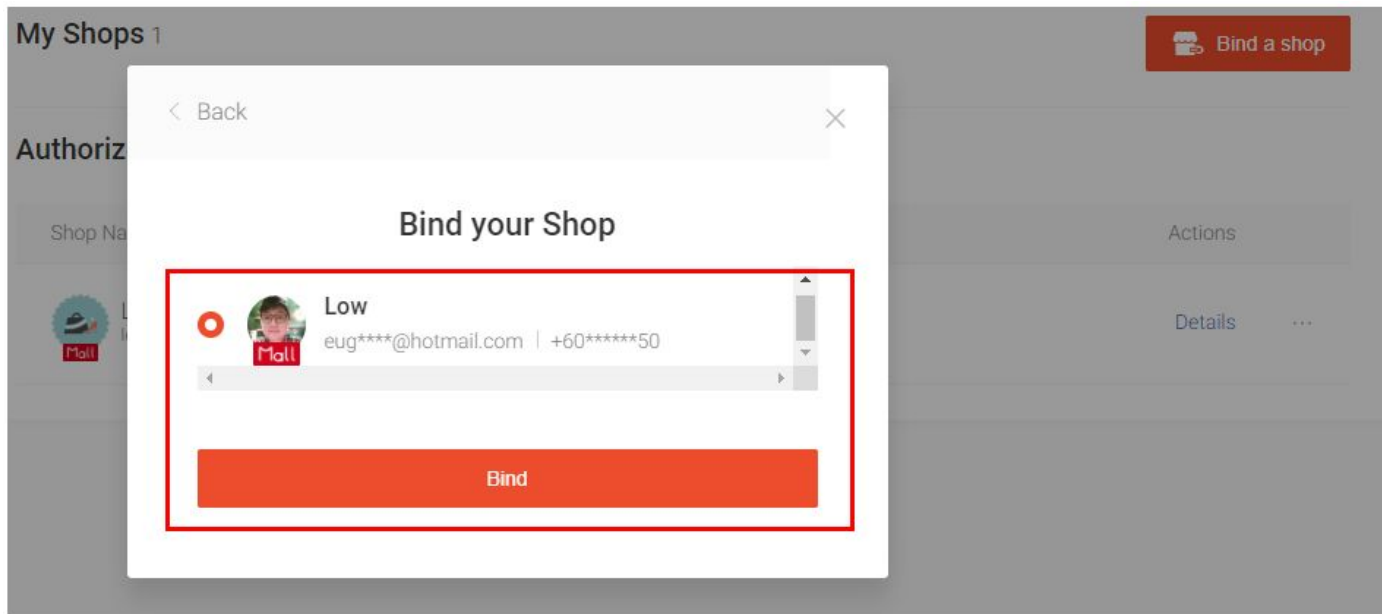


How to Bind Shop

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. On the left is a sidebar with navigation options: 'My Team' (selected), 'Members', 'Roles', 'My Shops', 'Chat Distribution', 'Performance data', 'Activity Log', and 'My Account'. At the bottom of the sidebar is a 'Seller Center' link. The main content area is titled 'Members 3/100' and includes a 'Sample Test Account' link. A red 'Create a member' button is in the top right. Below the title are filters for 'All Status' and 'All Roles', and a search bar labeled 'Q Member's name/username'. A section titled 'Active and suspended members 3' lists three members: 'Agent B' (webchatuat:victorg, Agent role, Active status), 'Agent C' (webchatuat:bentdantest, Agent role, Active status), and 'Emma' (webchatuat:emmac, Chat CS role, Active status). Each member entry has a 'Details' link.

Member	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.

1 Basic Information

2 Permissions

3 Complete

Member's Name


Input member's name

Email Address

Member's Email Address

To receive account activation email

Phone Number

 +60

Input Phone Number

To receive verification code during account activation process and other sensitive scenarios.

Cancel

Next : Permissions



Sub-Account Creation & Permission Management

Step 3:

Select a role for this sub-account.

The screenshot shows a three-step process for creating a sub-account. Step 1, 'Basic Information', is completed. Step 2, 'Permissions', is the current step. At the top, there are three progress indicators: '1 Basic Information' (completed), '2 Permissions' (active), and '3 Complete' (disabled). Below the progress bar, the 'Role' section features a dropdown menu labeled 'Select Role'. This dropdown is open, showing a list of roles: Administrator, Merchandiser, Fulfillment, Finance, Chat CS, and Brand Login. The 'Administrator' role is highlighted. To the right of the dropdown, there is a text input field with the placeholder 'Assign permissions resembling various duties'. Below this, there is a button labeled '+ Add Shops'. At the bottom of the form, there are two buttons: 'Previous' and 'Save Member'.

1 Basic Information 2 Permissions 3 Complete

Role

Select Role

- Administrator
- Merchandiser
- Fulfillment
- Finance
- Chat CS
- Brand Login

Assign permissions resembling various duties

+ Add Shops

Previous Save Member



Sub-Account Creation & Permission Management

Step 4:

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

Members > Add new members

1 Basic Information — 2 Permissions — 3 Complete

Role

Merchandiser

Role is a collection of preset

Applicable Shops 0


Permission Details

Set Role and Applicable Shops to view permissions

Previous Save Member

Add Shops

☒ Select All

☒  Lelong 4

1 Shop Selected

Cancel Confirm

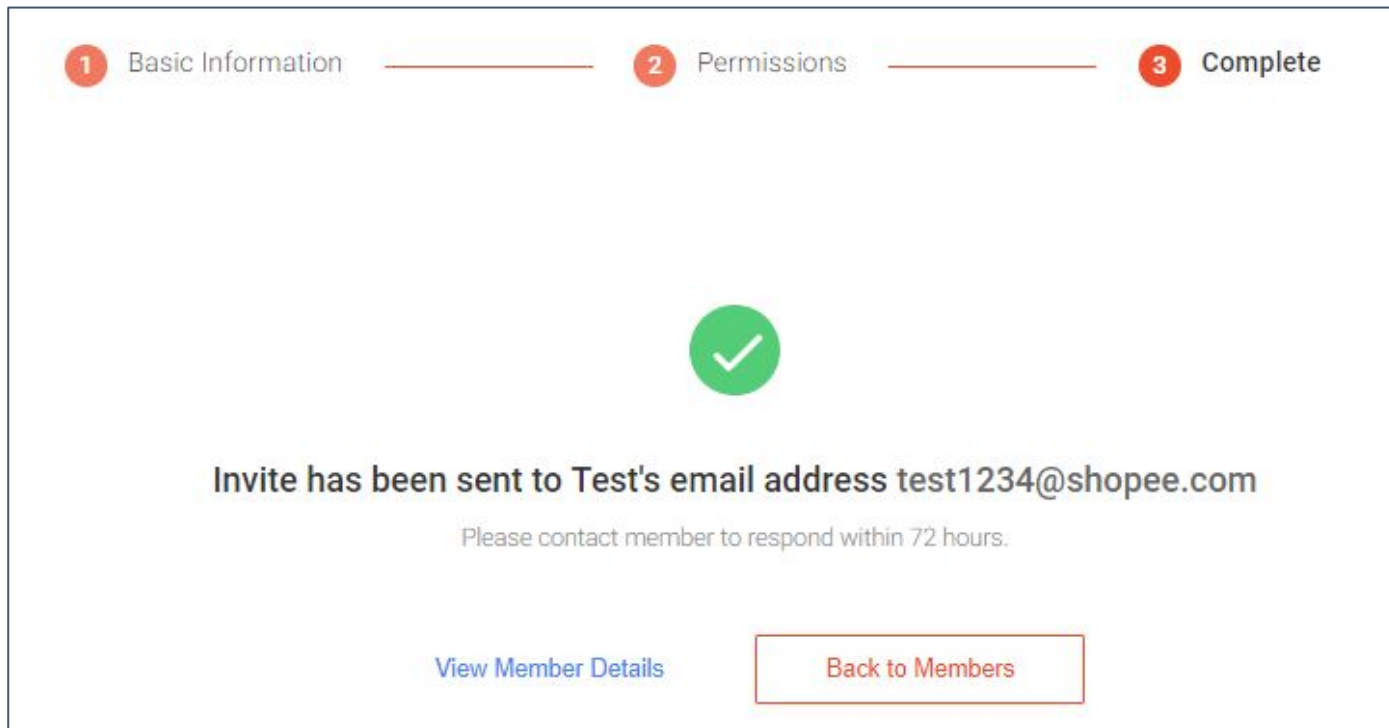
+ Add Shops



Sub-Account Creation & Permission Management

Step 5:

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



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 displays the 'Members' management page for a 'Sample Test Account'. At the top, it shows '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'. A section titled 'Active and suspended members 3' lists three members:

Member	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

Role

Agent

Applicable Shops

1 Shops

 Lelong

Edit Permission >



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

My Team

Members ●

Roles

My Shops

Chat Distribution

Chat Distribution

Performance data

Activity Log

My Account

Seller Center >

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

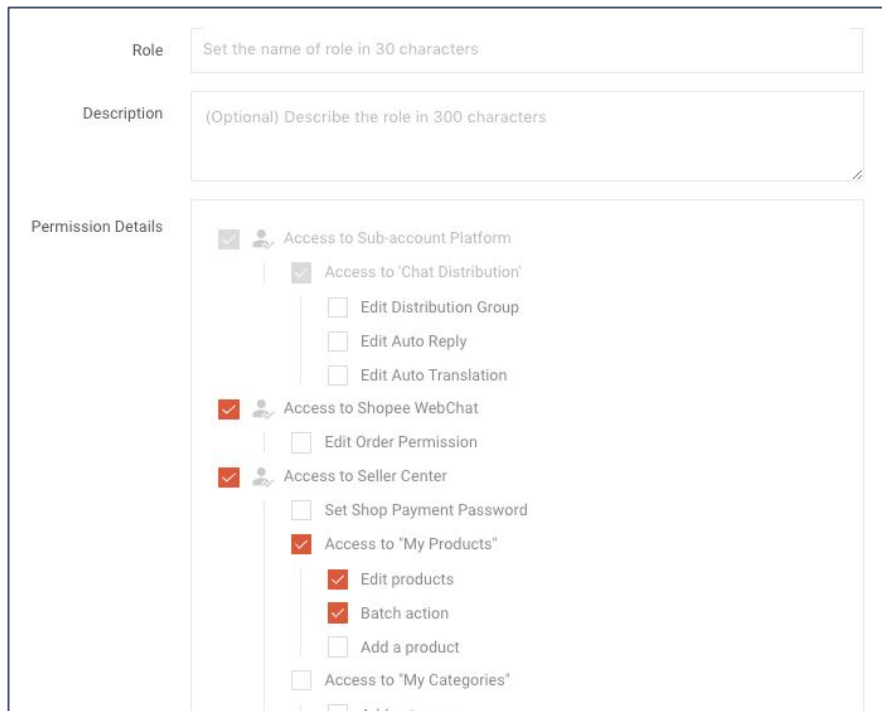


Role Creation

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 'Role Creation' form with 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, each with a checkbox and a sub-list of actions:
 - ☒ 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>