RESEARCH AUTOMATORS

How to Add a Client with Distribution Access

Survey Automator guide

How to Add a Client with Distribution Access

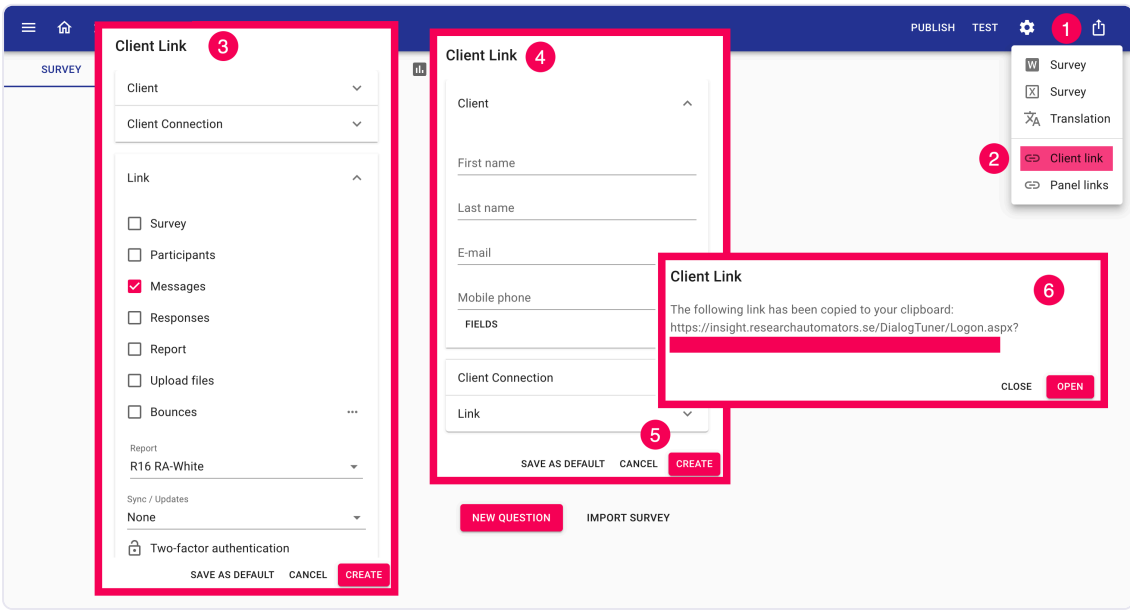
GUIDE GETTING STARTED AND LOGIN

Why Add a Client for Distribution?

By adding a **Client**, you can grant an external contact secure access to the parts of the project needed to work on mailings. You choose which tabs **the Client** has access to. This makes it easy to let a customer or contact collaborate without granting full user permissions.

Here's how to do it step by step

1. **Open your project** and click Export in the upper-right corner.
2. Select **"Client link**."
3. Check the **Messages** box → click **Client** above.
4. Enter the client's name and email address.
5. Click Create.
6. Copy the link from the window that appeared; that's the URL you'll share with the client.



The latest version of this guide: https://www.researchautomators.com/guides/add-client-with-distribution-access/