

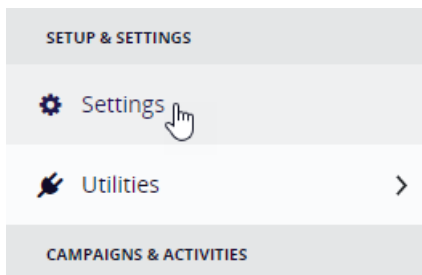
Users Account Settings

Last Modified on 08/29/2022 4:01 pm PDT

GiveSmart Fundraise supports an unlimited number of users on your account. If there are others in your organization that need access to the platform you can easily add additional users. From the Users category, you can create new users, edit existing user accounts, delete users and, if you have the optional feature enabled, set different security settings.

Accessing User Accounts

- Click on **Settings**.



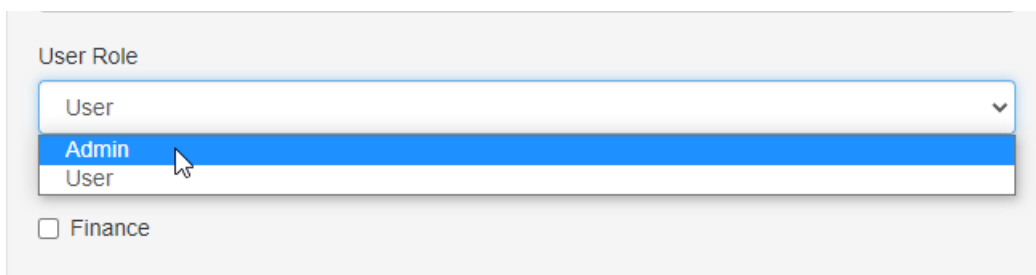
- It should automatically drop you into the **Users** section, otherwise, click **Users** on the right.

NOTE: If you do not see the gear wheel icon, then your user does not have Admin privileges. Please contact your account admin to ask that they give you the required privileges to access the Account Settings.

Add New Users

- Click the **Add User** button in the upper left.

- Enter the new user's **Email Address**
- *It is not recommended to use the **Username** option.*
 - *While in some cases you can use a username to log into GiveSmart Fundraise, this functionality is being phased out, as it is not compatible with switching between GiveSmart products.*
- Create a **Password** for them.
- Enter that same password in the **Password confirmation**.
- If you want this user to be able to access the **Settings** tab in your account, use the drop-down and select **Admin**.

A screenshot of a 'User Role' dropdown menu. The dropdown is open, showing three options: 'User', 'Admin' (highlighted in blue with a mouse cursor), and 'User'. Below the dropdown is a checkbox labeled 'Finance'.

- If you want this user to be able to Void or Refund transactions and update recurring

donations, check **Finance**.

- Admin Level accounts automatically have the Finance flag checked.

For more information about the different types of User accounts and what they can do, [click here](#).

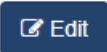
- Enter the user's **Name**
 - This will be displayed in the upper right of the GiveSmart Fundraise application when they are logged in.
- Enter the user's **Mobile Number**.
 - Entering their mobile number allows them to send test messages to verify the text looks the way they want before they send the text message to a wider group of supporters.
- Enter the user's **Time Zone**
 - Text messages scheduled by this user will send according to their time zone).
- Click **Create User**

- When you click **Create User**, you will be shown a confirmation screen that let you verify the information you have entered.

User was successfully created. ✕

User

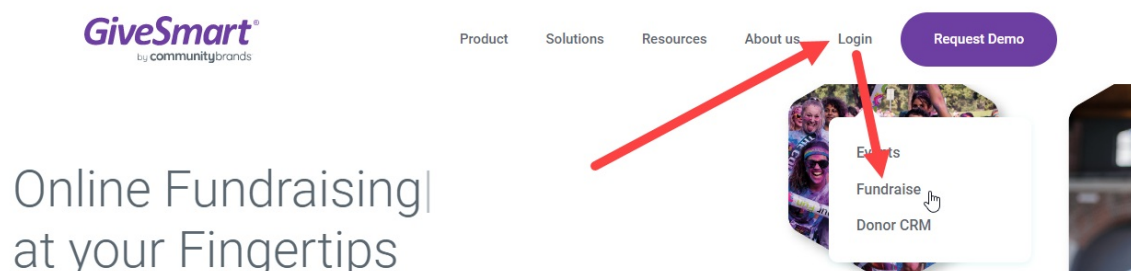
Email:	scott.couchman+demo@communitybrands.com
User Name:	scottcouchmandemo
Admin:	true
Finance:	true
Global User:	false
Name:	Scott Couchman
Mobile Number:	(555) 555-5555

 Edit

- If you made a mistake in creating an account, you can immediately edit the account by clicking the **Edit** button on the confirmation page, or later as described below.
- Instruct your users to go to www.givesmart.com and select **Login** at the top right.

marketing@givesmart.com 800-667-8075

Customer Support



GiveSmart[®]
by communitybrands

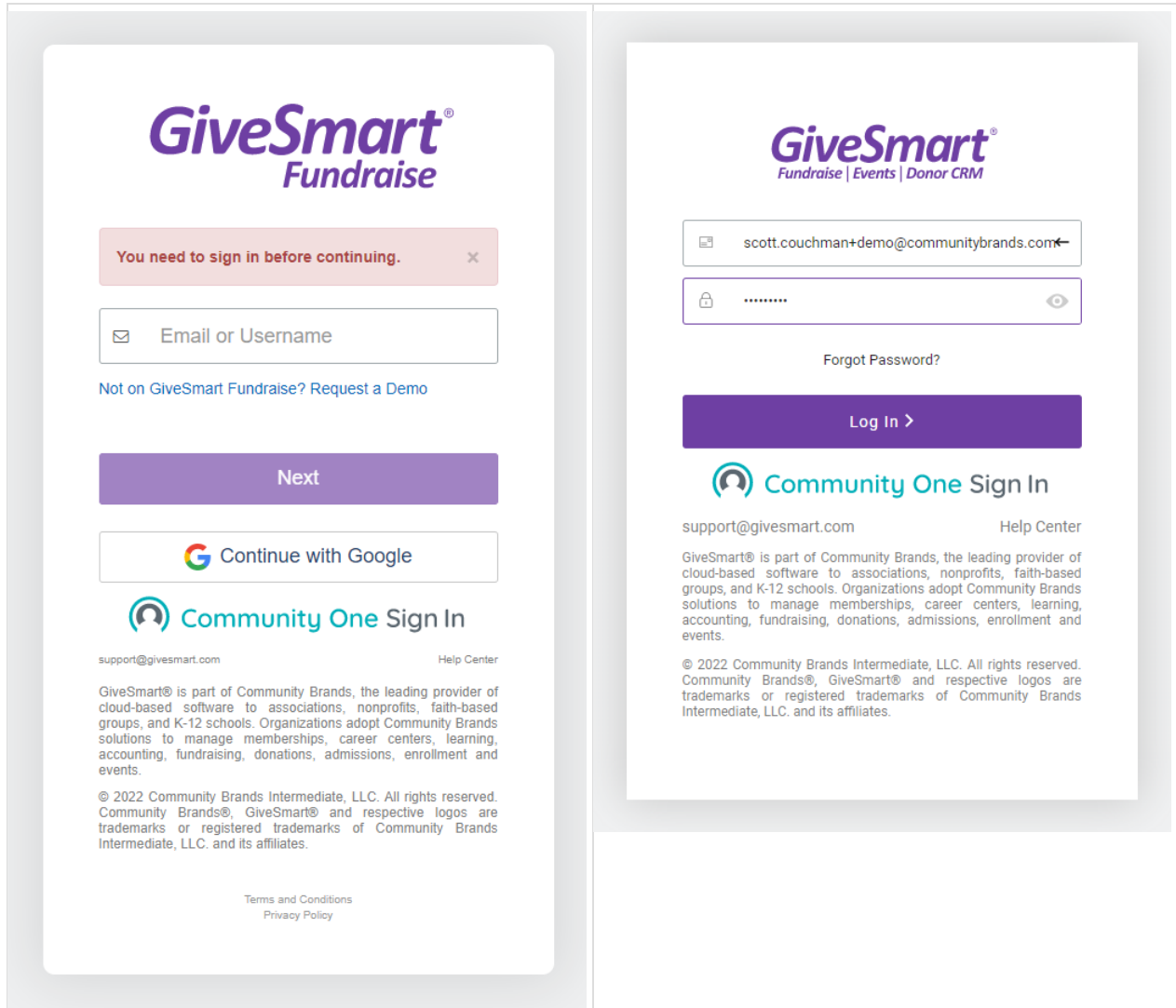
Product Solutions Resources About us Login Request Demo

Events
Fundraise
Donor CRM

Online Fundraising|
at your Fingertips

Note: it is highly recommended to bookmark the application page <https://fundraise.givesmart.com/> vs. going to www.givesmart.com every time. It saves you time and you don't need to find the correct application, etc.

- Users then enter their **Email** and **Password** and select **Log In** to access their account.










Edit Existing Users

- Go to the **Users** section of the Account **Settings**.
- Click the **Edit icon** in the Action column by the user you wish to edit.

◀ Back to Dashboard

Settings

+ Add User

Name	Email	User Name	Mobile Number	Verification	Account Roles	Actions
Ford Prefect	scott.couchman+demo2@communitybrands.com	fordprefect			Fundraising	 
Arthur Dent	scott.couchman+demo42@communitybrands.com	arthurdent			Finance	 
Scott Couchman	scott.couchman+demo@communitybrands.com	scottcouchmandemo	(626) 512-9046		Admin Finance Global User	 

- The Edit screen has the same options as the Create New User screen above.
- The one addition is that when you edit a user, you can have them emailed when a recurring donation fails to complete its processing. That way this user can then reach out to the donor to update their credit card information or determine the issue. For more on managing recurring donations, [click here](#).
 - Put a check in the box to **Enable Email Notification for Failed Recurring Donation** for this user if desired.
- When you are done making changes to the user account, click **Update User**.

Edit User

Email

Username

User Role

Permissions

Finance

Name

Mobile Number

Time zone

Enable Email Notification for Failed Recurring Donation

API Token Key: To manage your API Token Key please visit the Developer Portal

Update User






Delete Users

- Go to the **Users** section of the Account **Settings**.
- Click the **Delete icon** (the trashcan) in the Action column by the user you wish to delete.

[← Back to Dashboard](#)

Settings

[+ Add User](#)

Name	Email	User Name	Mobile Number	Verification	Account Roles	Actions
Ford Prefect	scott.couchman+demo2@communitybrands.com	fordprefect			Fundraiser	
Arthur Dent	scott.couchman+demo42@communitybrands.com	arthurdent			Finance	
Scott Couchman	scott.couchman+demo@communitybrands.com	scottcouchmandemo	(626) 512-9046		Admin Finance Global User	 

- You will be shown a pop-up to confirm the deletion. Click **OK** to permanently delete the user.

fundraise.givesmart.com says

Are you sure?