

Types of User Accounts

Last Modified on 06/02/2022 10:09 am PDT

Instead of having several different roles with different types of access that you need to remember what each level allows, GiveSmart Fundraise keeps it simple with two main types of User accounts or roles: the Administrator (or Admin) and the User. Instead of different roles, we use permission levels for special features. There is a permission level called Finance that can be added to the User level account.

To create or edit User accounts, [click here](#).

Settings

Users + Add User Security Settings

Name	Email	User Name	Mobile Number	Verification	Admin	Finance	Actions
Scott Couchman	scouchman+demo@mobilecause.com	scottcouchman	(626) 512-9046	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Delete
Ford Prefect	scouchman+demo2@mobilecause.com	fordprefect					Edit Delete
Arthur Dent	scouchman+demo42@mobilecause.com	arthurdent				<input checked="" type="checkbox"/>	Edit Delete

Admin Level Accounts

The Administrator-level accounts have access to everything in the GiveSmart Fundraise account. This may sometimes be referred to as an NPO Admin account.

The areas where the Admin has exclusive permissions are:

- [Account Settings](#). The User account cannot access the Account Settings and does not even show the account settings icon in the Navigation menu. If you need to make changes at the account level, such as adding new users, changing default templates and emails and more, you will need to have Admin level permissions.



- [Crowdfunding and Peer-to-Peer Fundraising: Change the Peer Fundraiser Status](#). If you have enabled this feature in the Crowdfunding and Peer-to-Peer Fundraising activity so you need to approve fundraisers before they become active then only an Administrator can be alerted that they need to change the Status through email, and only an Administrator can actually see and change the Status on the Volunteer Fundraiser's account.

Team Captain

Peer Fundraiser Status

Fundraiser: Jeanne Carr

- Active
- Inactive
- Locked
- In Review
- Pending

- The Finance permission is always included in the Admin Level account.

User Level Accounts

The easy way to describe the User level account is that it can still do everything in GiveSmart Fundraise *except* what is outlined above in the Admin account exclusives.

In general, the User Level account can:

- Add/Edit Campaigns
- Add/Edit Activities, including the Website Donation Form

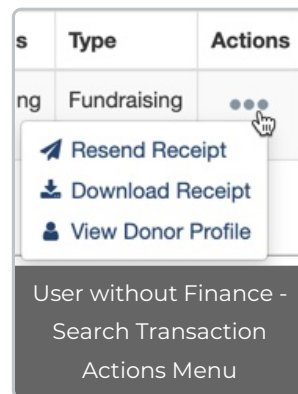
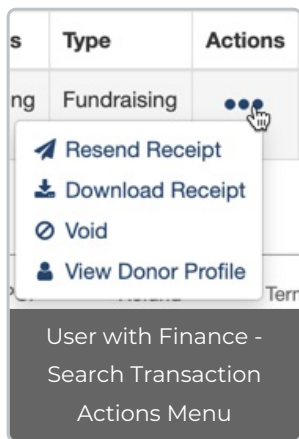
- Send Text messages (and Email messages if that feature is incorporated)
- Add contacts to Lists for sending messages

- Run Full Reports
- Mark Text Messages as Test to remove them from Fundraising Thermometer pages
- Send Texts about updating Credit Card information on Recurring Donations and access the donation page to update the credit card information for a recurring donor.
- Resend and Download Receipts for donors
- Create Saved Reports

Finance Permission

Again, the Admin role has the features available in the Finance permission and the User role does not (by default). You can check the Finance Permission for a User level account to give them the following additional functions:

- Void transactions
 - Accessed from the [Search Transactions Reporting](#) option, when you review your search criteria, at the bottom of the page, you will see the individual donations. The Finance permission adds the option in the Actions Menu to **Void** the transaction.



- Update [recurring donations](#)

- The Finance permission allows a User account to Manage a recurring donation, including changing the amount, changing the number of payments, the Next Bill Date, and notifications the donor will receive.
 - The Finance permission also allows a User account to cancel a Recurring Donation.

