

Types of User Accounts

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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 are 2 permission levels called Finance and Community Brands Products that can be added.

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

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

Admin Level Accounts + Single Sign-On

For GiveSmart customers who own 2 or more GiveSmart modules, as an Admin, you can create additional admin who can utilize our Single Sign-On feature allowing your admin to have 1 username and password for all GiveSmart modules.

To elevate or add an admin as a SSO Admin (Global Admin), go to:

- Settings > Users
- Select to edit an existing user or create a new one
- Enter the required information, and check the box next to Community Brands Products
 - This checkbox will provide them with SSO access across all GiveSmart products that your organization owns
- Select Update User

They will **not** receive an automated email letting them know they have been upgraded. To

provide this email:

- Use the 9 Dot in the top right and select GiveSmart Events
- Select Admin from the left navigation
- Click Actions next to the new admin
- Select Resent Account Invitation from the dropdown

Once this Admin logs in using the link in their email, they will gain access to all owned GiveSmart products as the following:

- GiveSmart Fundraise - Admin access
- GiveSmart Events - Organization Admin access
- GiveSmart Donor CRM - Admin access

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.

User with Finance - Search Transaction Actions Menu	User without Finance - Search Transaction Actions Menu
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- 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.

User with Finance - Recurring Actions Menu	User without Finance - Recurring Actions Menu
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