

What is a Global User?

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A **Global User** is a user with single sign-on (SSO) access to multiple products.

If your organization has a bundled account structure, you may have access to the full GiveSmart product suite which can include the GiveSmart **Fundraise, Events,** and **Donor CRM** modules.

Interested in other GiveSmart modules? Reach out to your Customer Success Manager for more details on adding on new features to your existing plan.

How do I add a new Global User?

Admins with Global privileges can add new Global Users from the GiveSmart Fundraise Settings menu. Select **Settings** from the left navigation.

Select **+Add User** and complete the required fields.

Under Permissions, check the **Community Brands Products** box.

More information on User Account roles and privileges can be found [here](#).

How do I add Global privileges to an existing user?

From the User Account Settings, select the Edit Action.

From there, select the **Community Brands Products** box > Save.

IMPORTANT: Be sure that the Email Address and Phone Number for the user are an exact match across both modules. An email/phone mismatch on the admin in Fundraise or Events

will result in an error message.

Common Error Messages

When adding a new Global user or elevating an existing user with Global privileges, an error may be returned when the user is not yet an Organization Admin in the Events module:

*"A user was found in your organization with some of the provided information, but this user was not an organization admin. If your organization admin already exists in the GiveSmart Events system in a non-organization admin role, **please promote this user to an organization admin**. Otherwise, please ensure that there is not a campaign admin, volunteer, or donor with the same contact information."*

This means that the user already exists in GiveSmart Events, and therefore needs to be promoted in Events first. To resolve, navigate to the GiveSmart Events module to [add the user as an Org Admin](#).

IMPORTANT: Be sure that the Email Address and Phone Number for the user are an exact match across both modules. An email/phone mismatch on the admin in Fundraise or Events will result in the same error message.

Permissions error - Unable to create new Event Site

If [creating or copying an Event Site](#) from the **GiveSmart Events** Org Hub, a user without Global privileges will receive the following error:

"It looks as if you don't have the correct permissions to create or copy a GiveSmart Events Site."

To resolve, navigate to **GiveSmart Fundraise** and add or elevate the user with Global privileges using the steps above. Be sure that the Email Address and Phone Number for the user are an exact match across both modules.

Less Common Error Messages

"No products available" error

In some cases, a Global User may see an error when selecting the 9-dot to switch to a different

module:

"Oops! Looks like you don't have any products available."

This error is often related to an ad blocker or network firewall which is preventing the available products from showing. To troubleshoot, try the following to see if the products appear:

- Temporarily disable any ad blockers or browser plug-ins.
- Access GiveSmart using a different web browser
- Access GiveSmart on a different network (e.g. mobile data or home wi-fi).

If the products appear when taking any of the above actions, we'd recommend connecting with your organization's IT team for next steps.

Global Access to multiple organizations

It's possible that users who work with different organizations are already "Globalized" in other organization accounts across GiveSmart. When elevating a user that already has Global privileges elsewhere, an error may be returned:

In this scenario, reach out to Support and provide the user's email address and phone number for next steps which involve granting the user Global (Single Sign-On) access to two or more bundled organizations.

Note: The user will need to use the same email and phone associated with their other Global credentials.

Can I update the Email associated with a Global User?

When editing a Global User, the Email field is greyed out.

To update an email address for a Global User, first, uncheck the **Community Brands Products** box > Save. This will de-Globalize the user to allow edits to the email address.

Be sure to also update the email address for the associated Global User in GiveSmart Events. Next, edit the user in Fundraise and re-select the Community Brands Products box > Save to apply the changes.

IMPORTANT: When updating an email address for a Global User, be sure to update the email address for the associated Org Admin in the GiveSmart Events Org Hub as well.

