

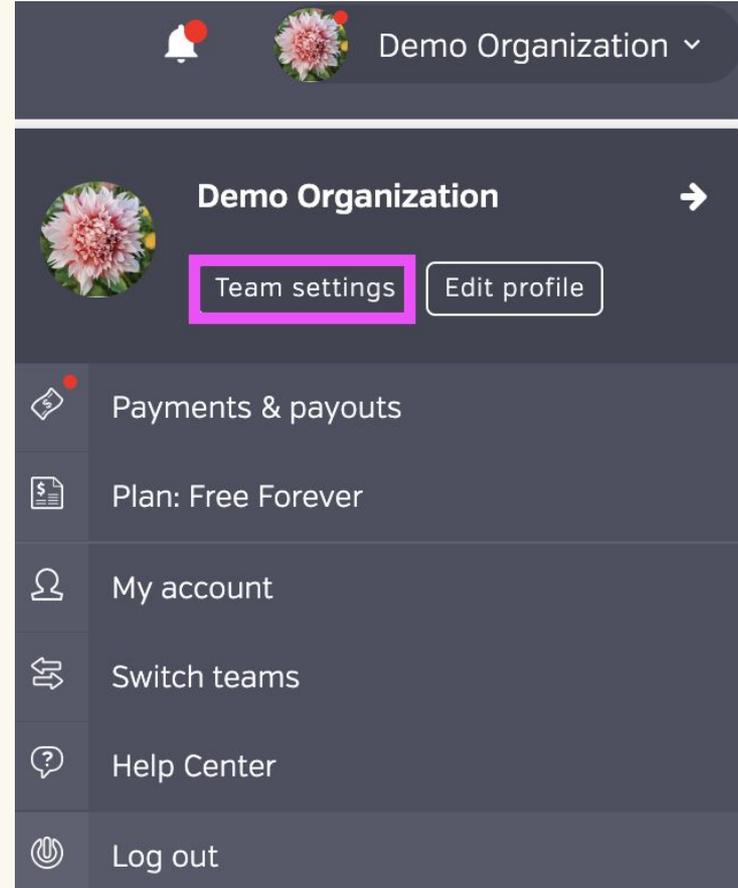
Creating New Roles &  
Inviting Team Members

**betterworld**

You are able to have multiple team members working on your dashboard at once. You can assign custom roles to each team member. To create roles and give a team member permission to access the dashboard using their own log-in, follow these steps.

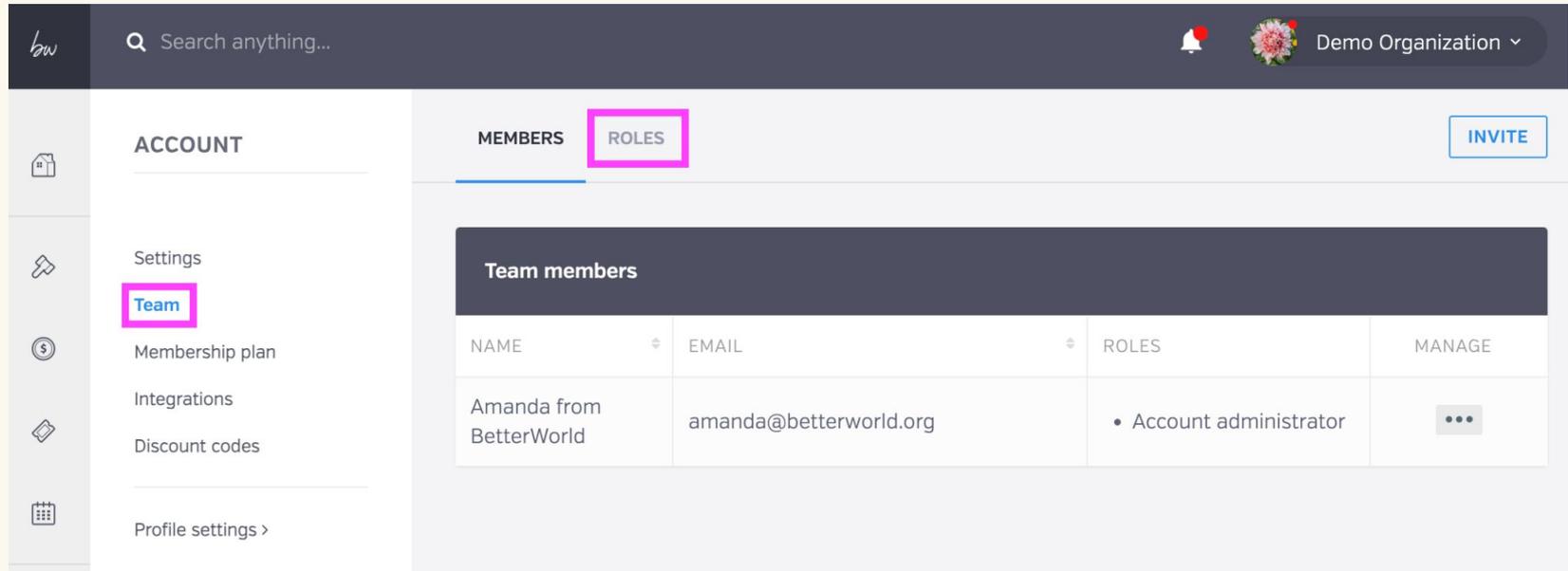
First, from the right-drop down menu of your dashboard, select *Team settings*.

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# Create Custom Team Roles

You can create custom team roles to choose who has access to what on the dashboard. To do this, select *Team* then *Roles*



The screenshot shows a dashboard interface for a team management tool. At the top, there is a dark header with the logo 'bw', a search bar, a notification bell, a profile picture, and the text 'Demo Organization'. Below the header is a sidebar with a home icon and a list of menu items: 'ACCOUNT', 'Settings', 'Team' (highlighted with a pink box), 'Membership plan', 'Integrations', 'Discount codes', and 'Profile settings >'. The main content area has two tabs: 'MEMBERS' and 'ROLES' (highlighted with a pink box). To the right of the tabs is an 'INVITE' button. Below the tabs is a table titled 'Team members' with the following data:

NAME	EMAIL	ROLES	MANAGE
Amanda from BetterWorld	amanda@betterworld.org	• Account administrator	⋮

There are pre-set roles of **Account administrator** and **Team member**, with pre-set permissions. You also have the option to add a **NEW ROLE** with custom permissions.

MEMBERS ROLES **NEW ROLE**

Roles

NAME	PERMISSIONS	MANAGE
Account administrator <b>PRESET</b>	<ul style="list-style-type: none"><li>Account and billing information</li><li>Team members and roles</li><li>Auctions</li><li>Donations</li><li>Ticketing and events</li><li>Contacts</li><li>Giveaways</li><li>Profile settings</li></ul>	n/a
Team member <b>PRESET</b>	<ul style="list-style-type: none"><li>Auctions</li><li>Donations</li><li>Ticketing and events</li><li>Giveaways</li><li>Profile settings</li></ul>	n/a

Show 10 roles < Previous 1 Next >

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**Create a new role** ×

**NAME**

Event Check-In

**USERS BELONGING TO THIS ROLE CAN MANAGE:**

Nothing selected ▾

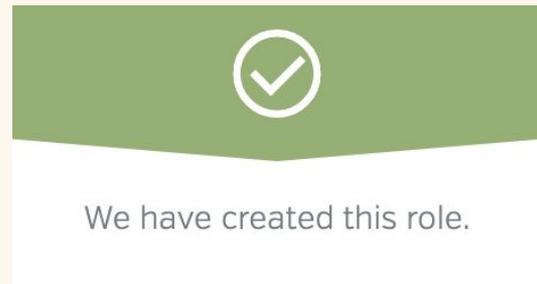
- Account and billing information
- Team members and roles
- Auctions
- Donations
- Ticketing and events**
- Contacts
- Giveaways
- Profile settings

Give your new role a custom name and select the areas of the dashboard this role can manage.

When you are finished, select

**Create role**

and you will receive this confirmation



The new role will appear here.

Select the three dots if you ever need to delete it.

Now you are ready to invite team members.

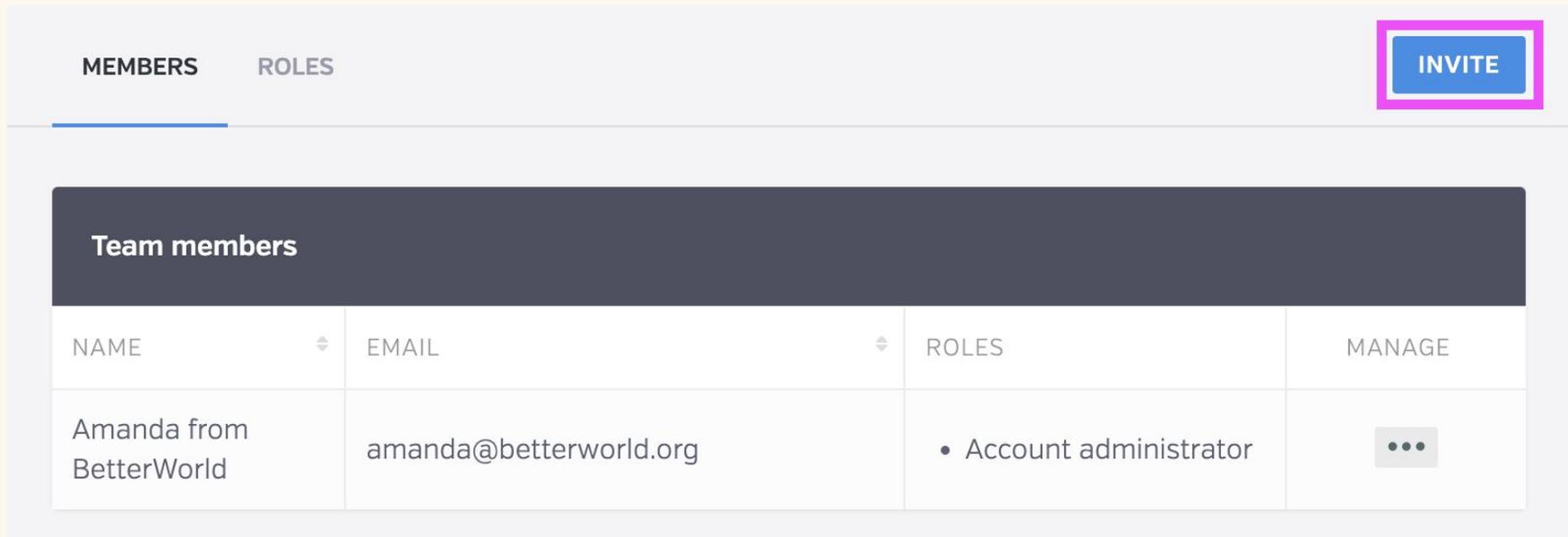
Roles		
NAME	PERMISSIONS	MANAGE
Account administrator <span>PRESET</span>	<ul style="list-style-type: none"><li>• Account and billing information</li><li>• Team members and roles</li><li>• Auctions</li><li>• Donations</li><li>• Ticketing and events</li><li>• Contacts</li><li>• Giveaways</li><li>• Profile settings</li></ul>	n/a
Team member <span>PRESET</span>	<ul style="list-style-type: none"><li>• Auctions</li><li>• Donations</li><li>• Ticketing and events</li><li>• Giveaways</li><li>• Profile settings</li></ul>	n/a
Event Check-In	<ul style="list-style-type: none"><li>• Ticketing and events</li></ul>	⋮

Show  roles < Previous 1 Next >

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# Inviting New Team Members

Click back to the *Members* tab and select the **INVITE** button



The screenshot shows a user interface for managing team members. At the top, there are two tabs: 'MEMBERS' (which is active and underlined) and 'ROLES'. In the top right corner, there is a blue button labeled 'INVITE' with a purple border. Below the tabs is a dark grey header for the 'Team members' section. Underneath is a table with four columns: 'NAME', 'EMAIL', 'ROLES', and 'MANAGE'. The 'NAME' column contains 'Amanda from BetterWorld', the 'EMAIL' column contains 'amanda@betterworld.org', and the 'ROLES' column contains a bulleted list with 'Account administrator'. The 'MANAGE' column contains a grey button with three white dots.

NAME	EMAIL	ROLES	MANAGE
Amanda from BetterWorld	amanda@betterworld.org	<ul style="list-style-type: none"><li>Account administrator</li></ul>	

## Add a team member



Complete this form and your team member will receive an email invitation to create an account.

A note on roles: By assigning roles to team members, you can choose which actions they may perform on the site. You can edit the permissions granted by each role (and create new roles) [here](#).

### EMAIL

### ROLES

Nothing selected 

Close

Save

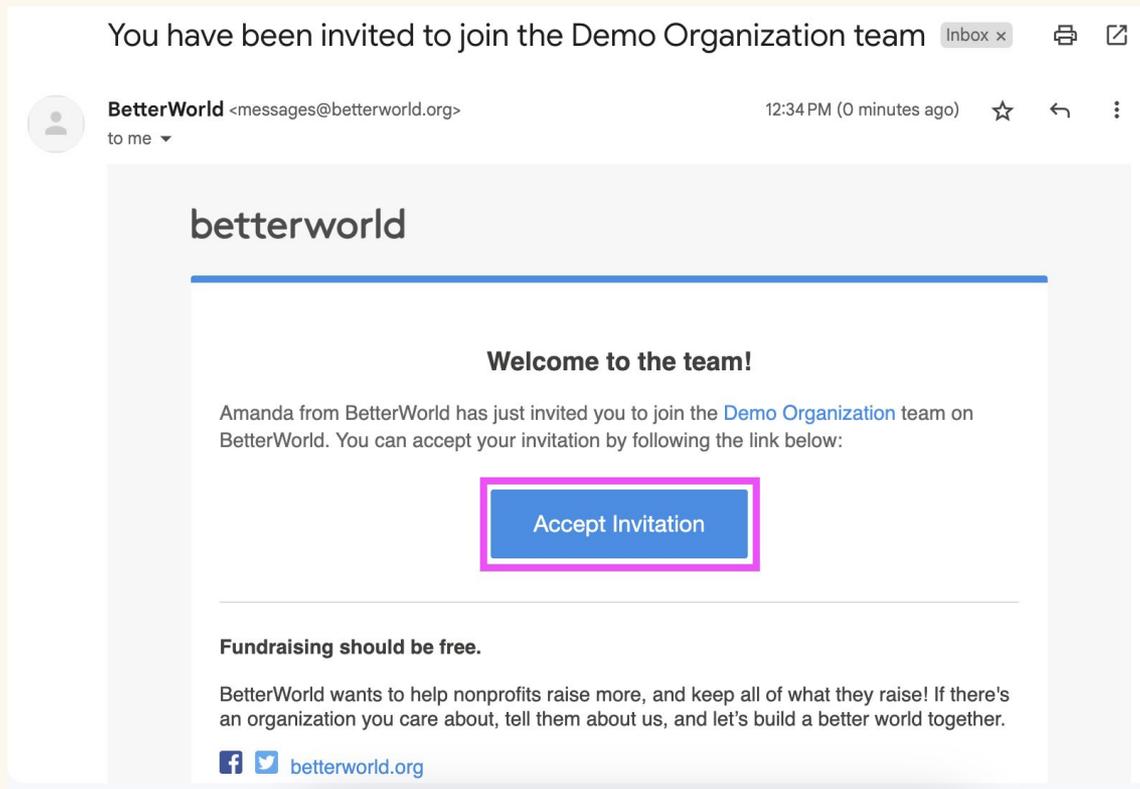
Add your team member's email address and select their role. Click Save, and you will receive this confirmation.



We have sent an invitation to this email address.

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Your team member will receive this email. They must click **Accept Invitation**.



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betterworld

Welcome to the Demo Organization team

Please create an account to begin working with Demo Organization.

FIRST NAME

LAST NAME

EMAIL

PASSWORD

I HAVE READ AND AGREE TO THE [TERMS AND CONDITIONS](#).

Create account

They will then be brought to this screen, which will prompt them to create an account.

Once they create an account, they will be directed to the dashboard.

Thanks, Amanda!

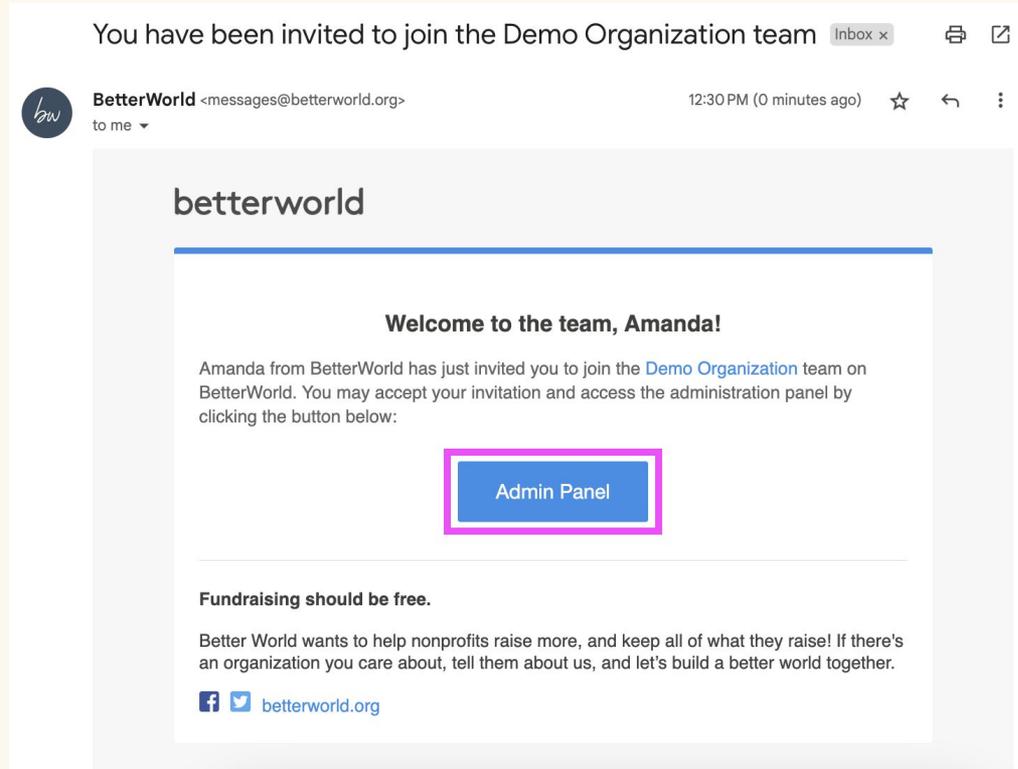
We have created your account. Click the button below to get started!

Go to dashboard

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If your team member already has a BetterWorld account (such as an account they created to make a donation), then the email will invite them to join the **Admin Panel**.

They will not need to create a new account, they will just need to login to gain access to the dashboard.



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Once logged into their account at [account.betterworld.org](https://account.betterworld.org) they can access the Dashboard by clicking here, or by going directly to [dashboard.betterworld.org](https://dashboard.betterworld.org)

**betterworld** [Dashboard](#)

Amanda from BetterWorld

**Activity** Settings

**Giving history**

- Donations
- Auctions
- Tickets
- Giveaways
- Tips
- Recurring donations

**\$0**  
GIVEN

**1**  
ORGANIZATIONS SUPPORTED

Your giving breakdown

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Their dashboard will only display the sections you gave them permission to view through the role in which you assigned to them.

The screenshot shows a dashboard for 'betterworld'. The top navigation bar includes the logo, a search bar, and the organization name 'Demo Organization'. The left sidebar contains three menu items: 'Dashboard', 'Ticketed events', and 'Item donations'. The main content area features two summary cards: 'TOTAL RAISED' at \$2,446.07 and 'CONTACTS' at 2. Below these is a table titled 'Raised from' with four rows: Donations (\$732.00), Auctions (\$1,541.35), Giveaways (\$23.94), and Events (\$148.78).

Raised from	
Donations	\$732.00
Auctions	\$1,541.35
Giveaways	\$23.94
Events	\$148.78

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